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Active User Manual

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Konrad-Zuse-Allee 13
21337 Lüneburg
Germany

Phone: +49 4131 7360 0
Telefax: +49 4131 7360 60
Email: info@evasys.de

Managing Director: Sven Meyer

USt-IdNr.: DE 179 384 158
Handelsregister: HRB-Nr. 1604, Lüneburg

Edited by Sandra Blomeyer, Dr. Iris Hille, Simone Höppner-Welcher, Bernd Röver, Ulrike Schiefelbein

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A. Preparation and General Notes

This manual addresses the specific questions of active users who work either parallel to the central evaluation or exclusively in decentral evaluation.

Active users can – in accordance with access rights – conduct all steps of a survey through their user account themselves.

This regards:

- Creating questionnaires. The right to create questionnaires is assigned by the administrator to each user individually. In this way, some users can setup surveys, but only with the questionnaires designated by the administrator. Others can edit these central questionnaires, but not create new ones etc.
- Conducting paper based and online surveys. With the existing questionnaires, active users can create surveys at will.
- Evaluating a survey. After reading the data, an active user automatically receives the results of the survey, which can be processed further – i.e. consolidate it with other reports, form sub-groups of specific criteria (i.e. by age, gender etc.) etc.
- The export as a CSV file and in statistics tools such as SPSS and Sphinx. Active users can further process the results of their surveys in other programs.

Active users access EvaSys – as do administrators – via a web browser and as such can theoretically access the system from any PC with internet access (except when, for security reasons, the administrator defines certain restrictions). Security of access is, as with the administrator, safeguarded by a password protected login as well as the capability of SSL encryption.

The questionnaires of paper based surveys are captured by de-central scanstations, operated by the users themselves. The scanning process is so simple to manage that no instruction is required.

Of course, it is not possible that active users can see each other's results. Only the active user himself and the administrator can gain insight to the data.

1. Notes on Terminology and Typography

The EvaSys Survey Automation Suite is available in three derivatives with different system languages. The same user type will be named differently depending on the suite used, and the system language that has been set:

- Education Suite (English Higher Education) – Instructor
- Healthcare Suite (English Neutral) – Project/Project Manager
- Corporate Suite (English Seminar Provider) – Trainer

In this manual, the term "active user" will be exclusively used as an umbrella term for these different user names.

Explanations are visualized through illustrations. In more complex windows, red eclipses/rectangles usually show which elements the comments in the text relate to.

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Menu names are set in quotation marks: “menu name”

Buttons are set in angular brackets: [button]

Three symbols alert you to important elements in the manual:

Notes, Hints and Examples are important elements of the manual and are highlighted with borders and shading (in PDF format through different colors)

Notes and important information can be recognized ba a salmon colored background.

Hints can be recognized by a yellow background color.

Examples which illustrate explanations are marked with a light blue background.

2. Manuals

In the section “Info/Help” the active user can access the active user manual as well as the manual on creating questionnaires with VividForms Editor.

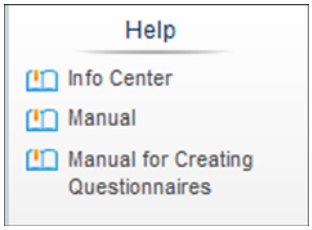

Figure 1: Manuals

Note:
All PDF documents have linked indices for easy navigation. Should these links not function properly, please check the settings of your Adobe Reader. To do this, open the menu “Edit/Settings/Documents” and select the answer “Never” for the option “Show document in PDF /A display mode”.

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In addition to this, the scanstation manual is available on the start page of the scanstation dialog.

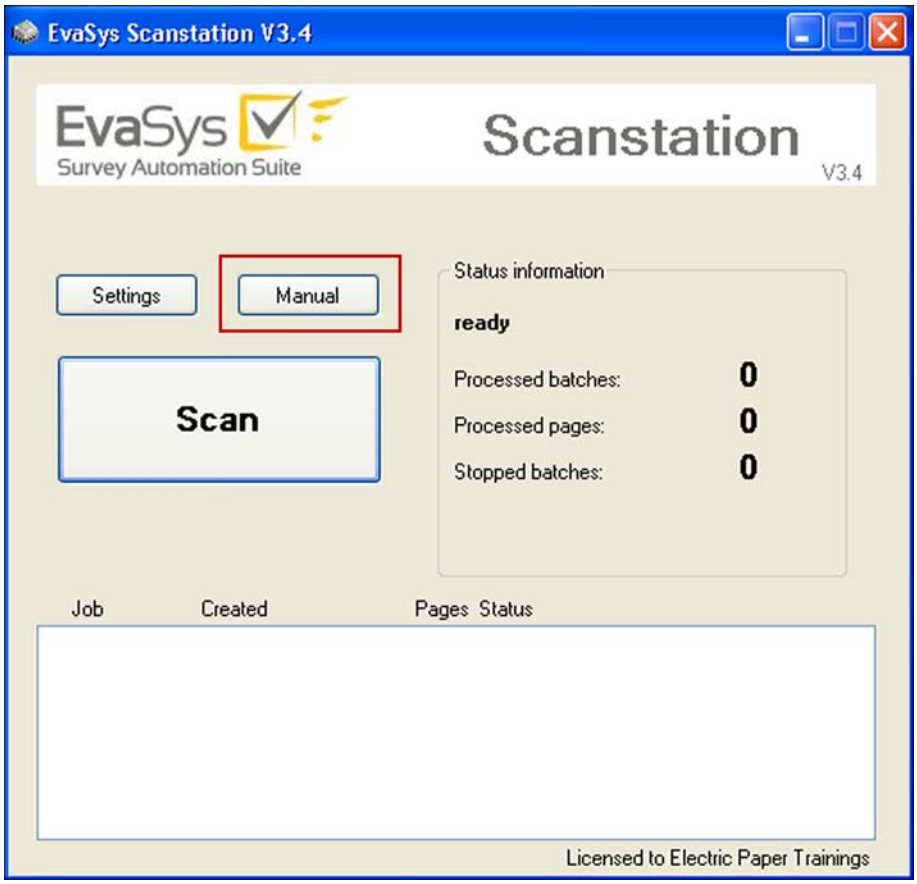

Figure 2: Main Window of the Scanstation

3. Fundamental Terms

Quire

Questionnaires can be made up of multiple pages. The complete exemplar of a questionnaire including all its pages is called a quire. As soon as more than one page is required, ONE quire enfolds multiple pages of paper.

Questionnaire

The term “questionnaire” can have two meanings in EvaSys:

- On the one hand, it describes the file in EvaSys that serves as a questionnaire template and determines the appearance of the questionnaire which is used for numerous surveys. In this case, it is a PDF file which contains the questionnaire and determines the questions and answer possibilities to be included in the questionnaire and how they appear. You can create paper based and online surveys with this template. In the case of online surveys with VividForms questionnaires, the design is not defined by the questionnaire but by online survey templates.
- On the other hand, when creating a survey you will of course receive a specific questionnaire, which you can use to distribute to all participants.

NonForms

A NonForm is a scanned page which is not recognized as a form.

This happens, for example, if you

- scan a questionnaire which is not yet included in the EvaSys recognition set. Then the VividForms reader can not read this form and it will be treated as an unrecognized form.
- scan an EvaSys form whose barcode has been manipulated. This form can no longer be recognized.
- scan something completely different, for example to test the scanner. These graphic files will of course be treated as NonForms.

Survey / Survey Procedure

In EvaSys, a survey is a process based on a questionnaire. To generate a survey you must first select a questionnaire which exists in the system and apply it to the survey.

The result of this is that a copy of the questionnaire template is created and connected with the survey (hard copy procedure) or a cover page is created for the survey which completes the standard questionnaire with the survey details (cover sheet procedure). The corresponding survey process is uniquely marked on the personalized questionnaire or cover sheet with a barcode, which is read in during the capturing phase. Only the correct identification by means of this code allows for the correct correlation of the data captured to the corresponding EvaSys survey.

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4. Creating Active Users

The administrator can assign different rights to the active user. These rights can only be changed by the administrator, not by the active user himself/herself. The following rights can be assigned:

- Can an active user create new questionnaires, extend administrator's templates or can he only use central templates to create his own surveys?

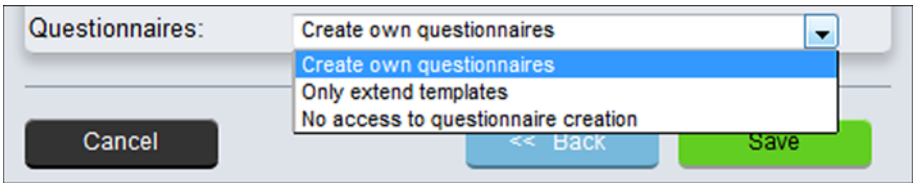

Figure 3: User Access to the VividForms Editor

Depending on which rights the active user has received, only the allowed functions are displayed in the left menu bar. If he is allowed to create his own questionnaires, the options "Questionnaires", "Create Questionnaire", "Templates" and "Verification" are displayed, if he is only allowed to use templates only the options "Questionnaires", "Templates" and "Verification" are displayed, if he has no access at all none of the options are displayed.

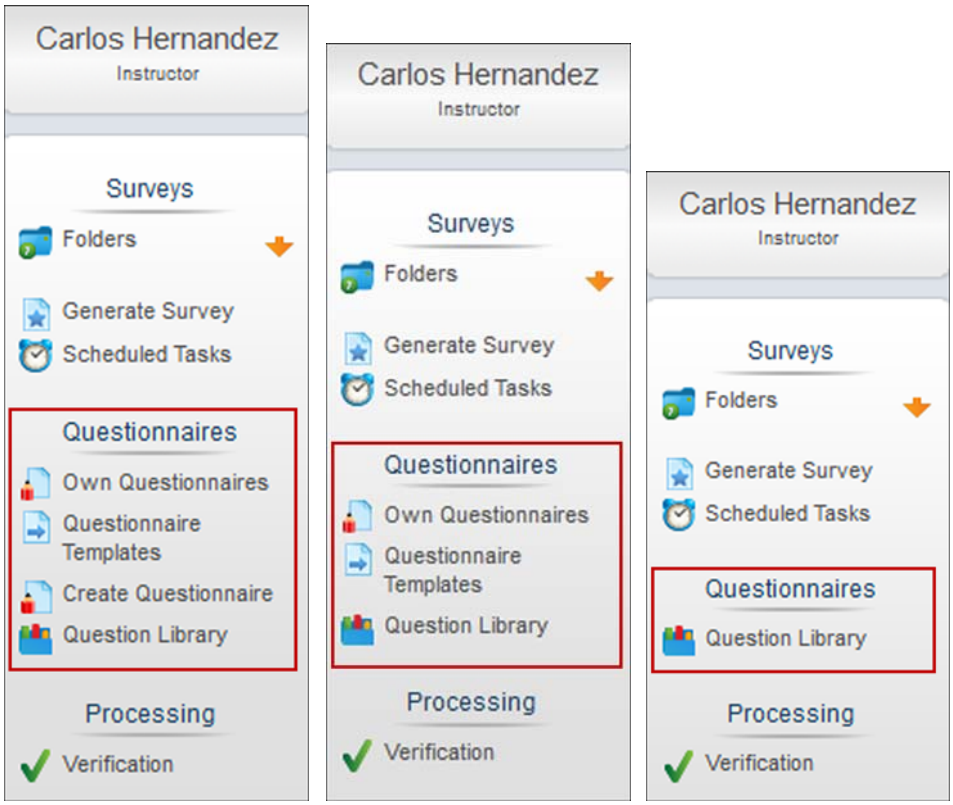

Figure 4: Possible Access to Questionnaires or Templates (a-c)

- After evaluation, can an active user see as to how far his surveys fulfill quality guidelines – or even those of his subunit (or possibly additional subunits) or even those of the complete system?

Figure 5: User Access to the QM Views

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B. Your Evaluation Process

1. Logging into EvaSys

You receive access rights from the administrator. The web address looks something like this: <evasys-serveraddress>/indexeva.php

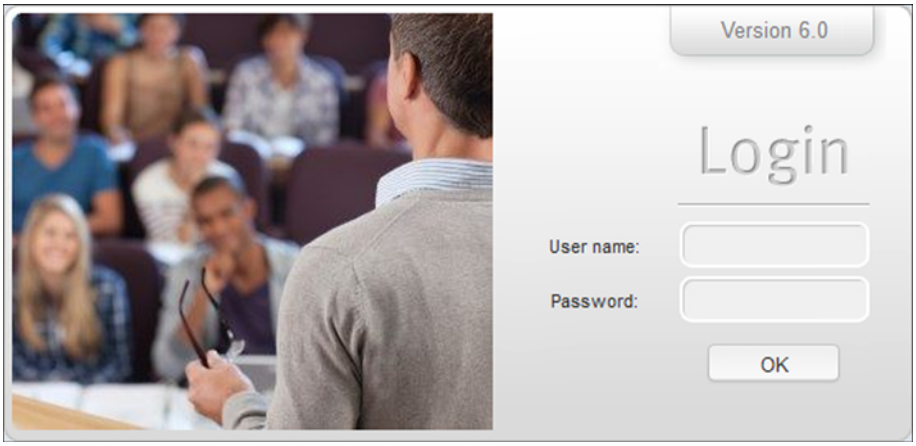

Figure 6: Access for Active Users

User name and password are requested. When applying access restrictions, access to this page is only possible from computers which are included in the defined IP address range for users.

After logging into the system the start page opens. Here you will find the three main menus "Actions", "Settings" and "Info" with the corresponding functions as well as a quick start page.

By clicking the logo in the upper left corner you can get back to the quick start page at any time.

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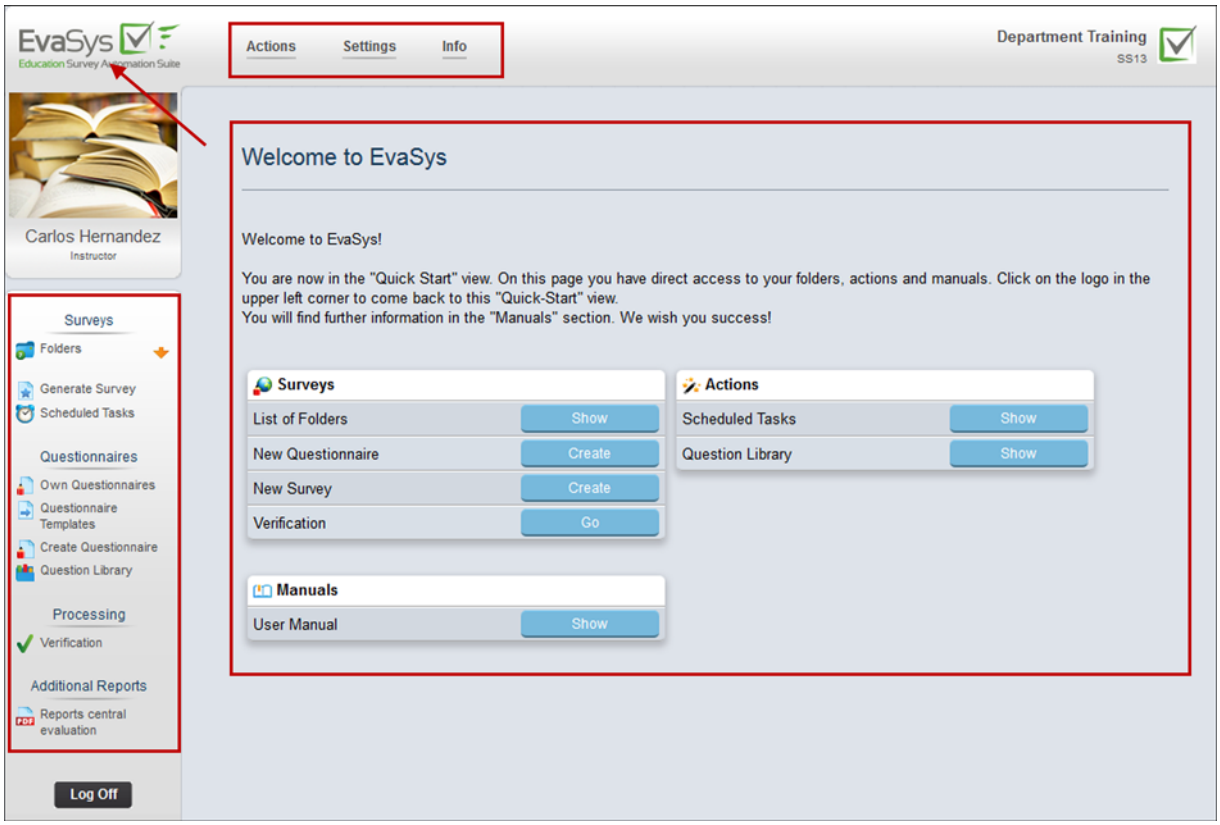

Figure 7: Welcome Screen

2. Adjusting Your Individual Profile

To begin with, the login data can be individually adjusted. To do this, click the entry “Settings/Account/User Profile”. An input mask opens where the user's personal data can be adjusted, and the log-in name and password changed. To commit the changes, click [OK].

Note:
For security reasons, every change to the user profile must be confirmed by the individual password in the section “Password *enter password to commit the changes”.

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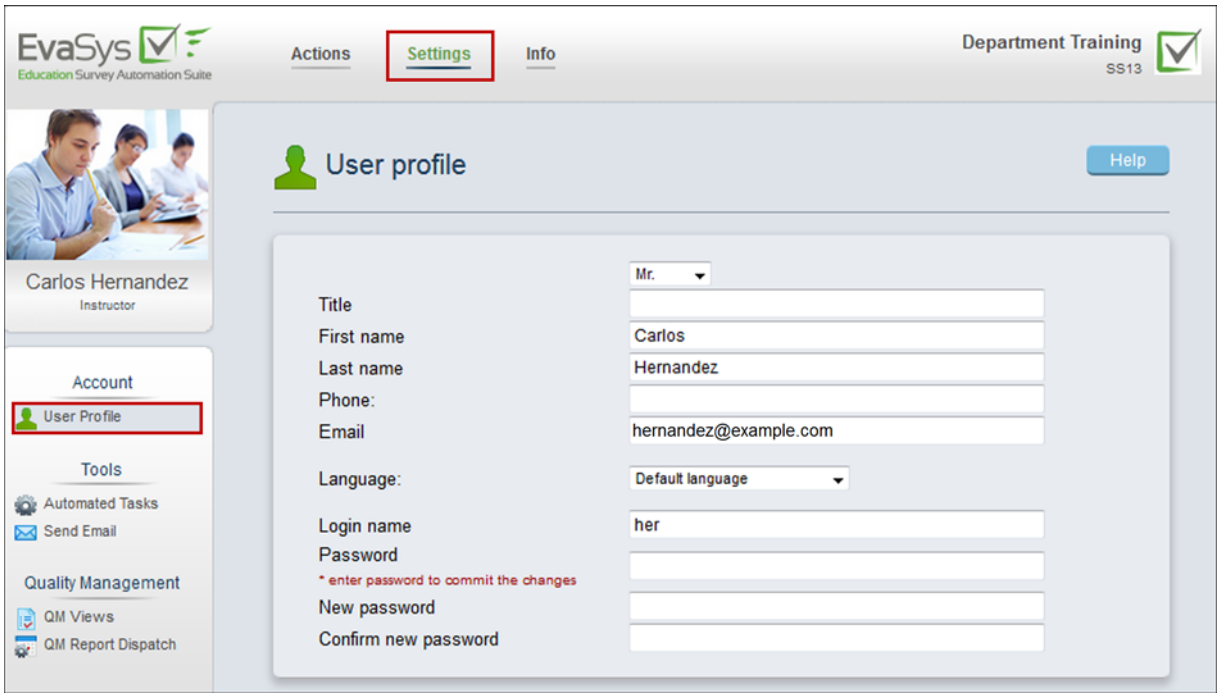

Figure 8: Adapting the User Profile

3. Adapting and Creating Questionnaires

A basic component of a survey is the questionnaire. The active user can use, edit and create questionnaires to various degrees, depending on the rights the administrator has allowed.

3.1. System-wide Questionnaires

The system-wide questionnaires are created and made available by the administrator. No changes, configurations or extra options can be added or undertaken by the active user.

The active users only have access to the system-wide questionnaires when new surveys are being generated.

3.2. Using Templates

In the “Actions/Questionnaires/Questionnaires Templates” section, you can find all the questionnaires that the administrator/subunit administrator has made available for individual additions.

How far these can be expanded is limited by the maximum page numbers and the maximum number of elements that have been set by the administrator.

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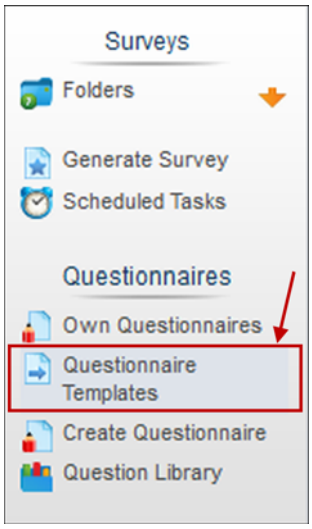

Figure 9: Select Questionnaire Templates

First copy this template by clicking on the icon in the column “Use Template”:

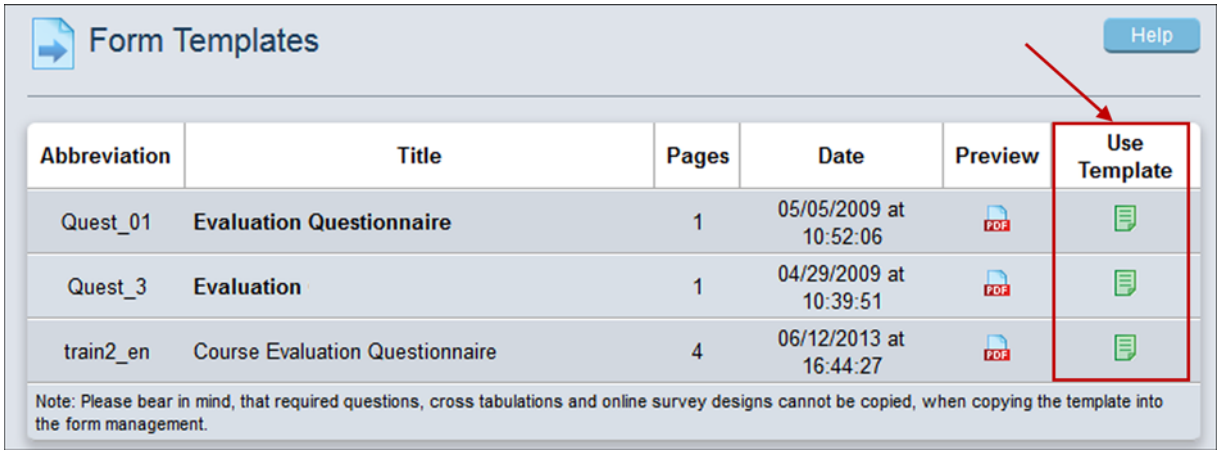

Figure 10: Questionnaire Templates

After copying, the Form Management is opened automatically. This contains the questionnaire that has just been copied. The reference [Template] will be automatically attached to the heading, indicating that the questionnaire comes from a template.

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Using the icon in the column “Use Template”, you can edit the questionnaire in the VividForms Editor:

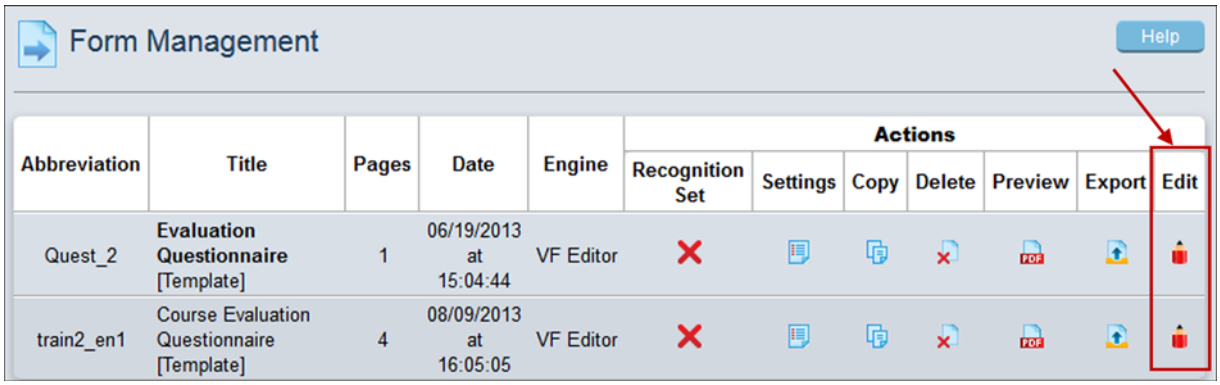

Figure 11: Form Management

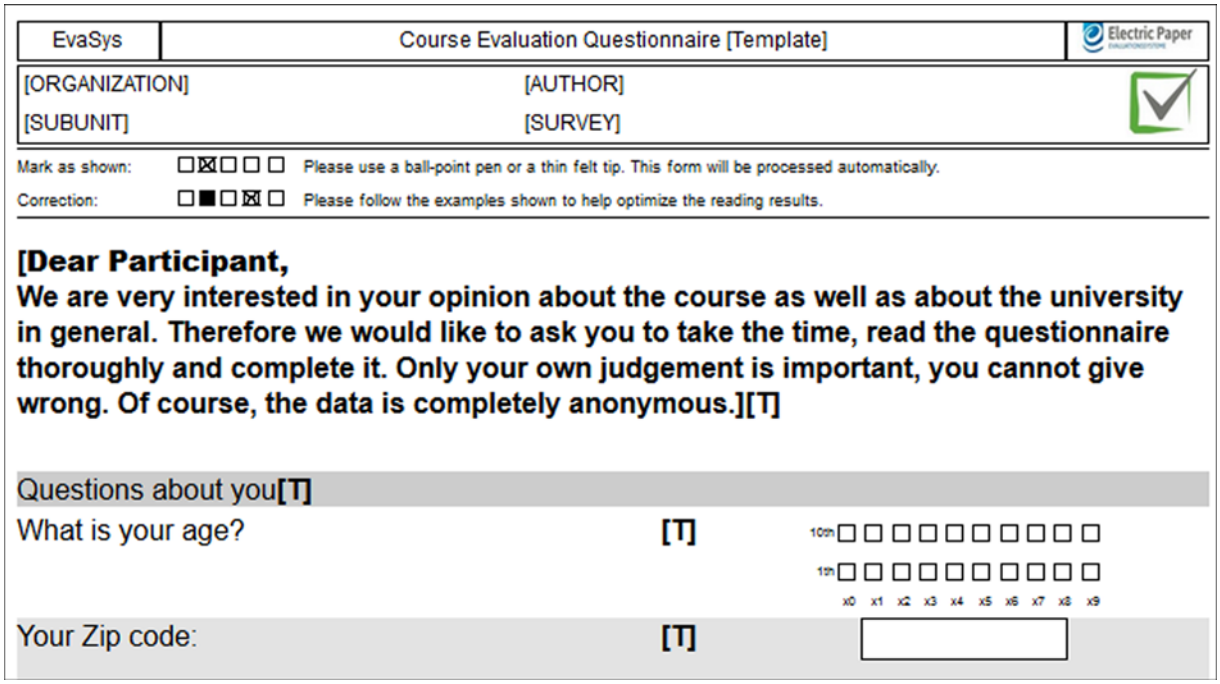
EvaSys
Course Evaluation Questionnaire [Template]
Electric Paper
[ORGANIZATION]
[AUTHOR]
[SUBUNIT]
[SURVEY]
Mark as shown:
Please use a ball-point pen or a thin felt tip. This form will be processed automatically.
Correction:
Please follow the examples shown to help optimize the reading results.
[Dear Participant,
We are very interested in your opinion about the course as well as about the university in general. Therefore we would like to ask you to take the time, read the questionnaire thoroughly and complete it. Only your own judgement is important, you cannot give wrong. Of course, the data is completely anonymous.][T]
Questions about you[T]
What is your age?
[T]
Your Zip code:
[T]

Figure 12: Questionnaire Template

The question groups and questions marked with a [T] (= Template) cannot be altered. You can place new question groups between existing ones or only at the end of the questionnaire, depending on the administrator's defaults. Adding new items at the end of the questionnaire simplifies comparing surveys later.

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3.3. Individual Questionnaires

If the administrator has given permission, the active user can access the VividForms Editor and Designer in the section “Create Questionnaire”and can create a completely individual questionnaire.

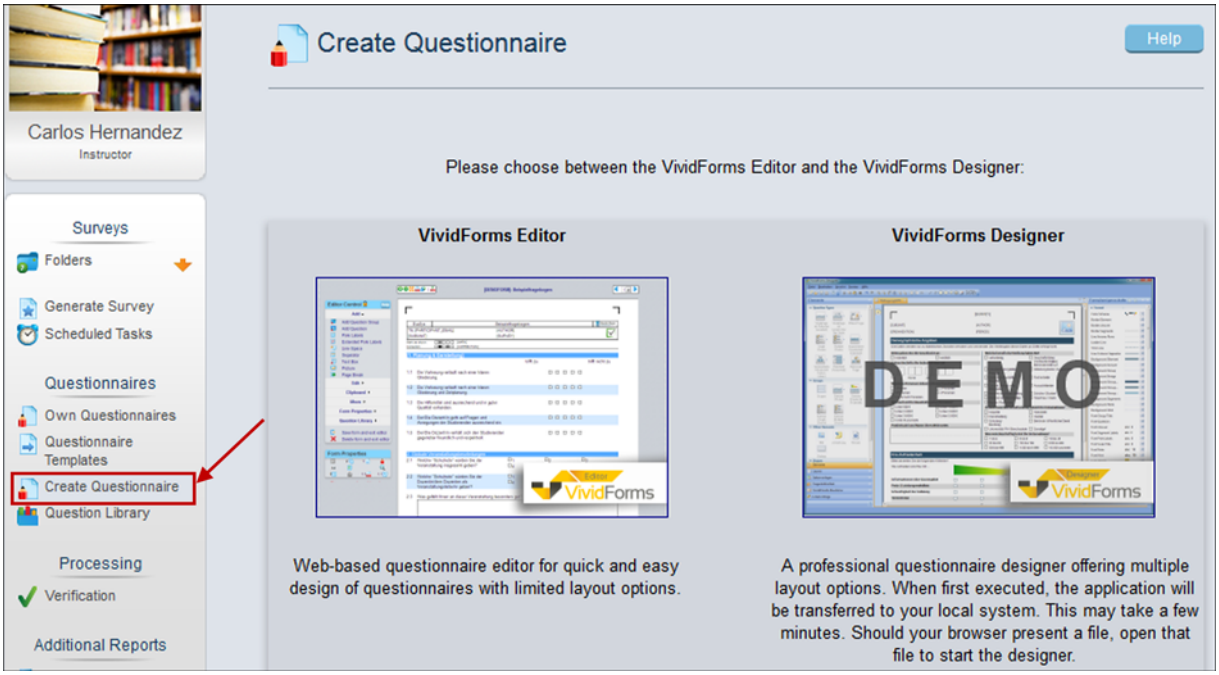
Carlos Hernandez
Instructor
Surveys
Folders
Generate Survey
Scheduled Tasks
Questionnaires
Own Questionnaires
Questionnaire Templates
Create Questionnaire
Question Library
Processing
Verification
Additional Reports
Create Questionnaire
Help
Please choose between the VividForms Editor and the VividForms Designer:
VividForms Editor
VividForms Designer
DEMO
Web-based questionnaire editor for quick and easy design of questionnaires with limited layout options.
A professional questionnaire designer offering multiple layout options. When first executed, the application will be transferred to your local system. This may take a few minutes. Should your browser present a file, open that file to start the designer.

Figure 13: Accessing the VividForms Editor and Designer

Exact instructions on creating a questionnaire with the VividForms Editor can be found in the manual “Creating Questionnaires with VividForms” (accessed in the “Infos/Help” section).

Exact instructions on creating a questionnaire with the VividForms Designer can be found in the manual, which is available in the VividForms Designer.

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You can find all the questionnaires that have already been created in the menu “Actions/Questionnaires/Own Questionnaire”. In this view, you can copy, delete, edit or export questionnaires.

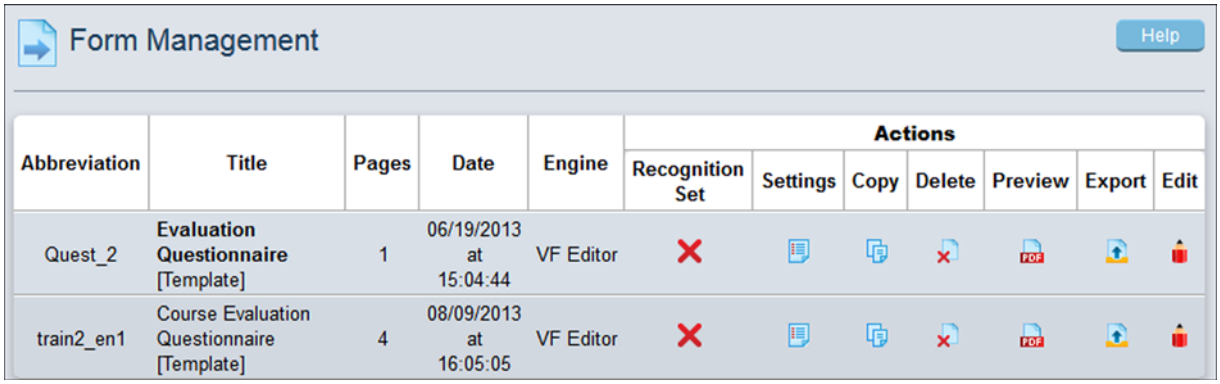

Figure 14: Form Management

Note:
As soon as the questionnaire has been inserted into a survey, the individual questions can no longer be edited. In this case, copying the questionnaire is recommended

In the menu “Settings” the following options can be found:

Validation

By defining validations you can test entries to open questions and matrix fields in online surveys with value ranges and regular expressions before a survey participant can send the questionnaire (see chapter 2 3.3.2. “Validation“).

Required Questions

Those questions for which an answer is compulsory can be defined here (see chapter 2 3.3.3. “Required Questions“).

Cross Tabulations

The cross tabulations shown here will appear in the PDF report (see chapter 2 3.3.4. “Cross Tabulations“).

Display Online survey

Here, you can define whether the questionnaire is displayed in online surveys as one page (i.e. to scroll down; option “Complete”), to browse (option “Per Chapter”) or according to the page display in the VividForms Editor (option “Per Page”).

With the option “Per Chapter” each question group is displayed in online surveys as one page.

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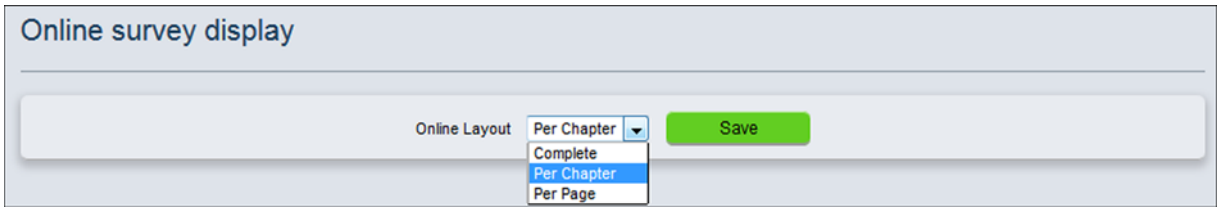

Figure 15: Display Online survey

3.3.1. Filter Settings

Of course you can create filter rules for online surveys. To do this, please use the functions in the VividForms Editor when creating or editing a questionnaire. For further information please consult the "Creating Questionnaires" manual which is available in the section "Info/Help" or directly in the VividForms Editor.

3.3.2. Validation

By defining validations you can test entries to open questions and matrix fields in online surveys with value ranges and regular expressions before a survey participant can send the questionnaire.

Figure 16: Validation

To create validations select a matrix field or an open question from the list and click on [Add].

Now select which values can be accepted:

- Numbers only – Here you can delimit the value range by storing a minimum and maximum value.
- Letters only – i.e. no blanks
- Letters or numbers only.
- Date.
- Pattern (simplified syntax) – By default, the following templates are available:
  - three-digit number,
  - word(underscore)number,
  - serial number.

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- All three examples are based on the following legend:
  - L = Letter
  - W = Word
  - D = Digit
  - N = Number

In addition, there is the possibility of using square brackets to label a placeholder as optional. In this way, the following pattern: D[D][D]-W means that only input consisting of a number of one to three digits, a hyphen and a word (in this order), will be accepted.

As well as the common syntax for patterns, there is also the possibility of using regular expressions (on the basis of Perl syntax) to formulate patterns. Regular expressions are often used to recognize patterns and offer a high level of flexibility.

- Pattern (regular expression) – The following template choices are available:
  - three-digit number,
  - word(underscore)number,
  - serial number (simple),
  - serial number (complex),
  - email address.

Note:
A question text should contain instructions for the correct completion of a validation question, so that the survey participant knows which input is admissible.

3.3.3. Required Questions

Questions for which an answer is compulsory can be configured as required questions.

When submitting a questionnaire in an online survey the system checks if all required questions have been answered. If this is not the case, the survey cannot be submitted unless answers to the required questions have been given.

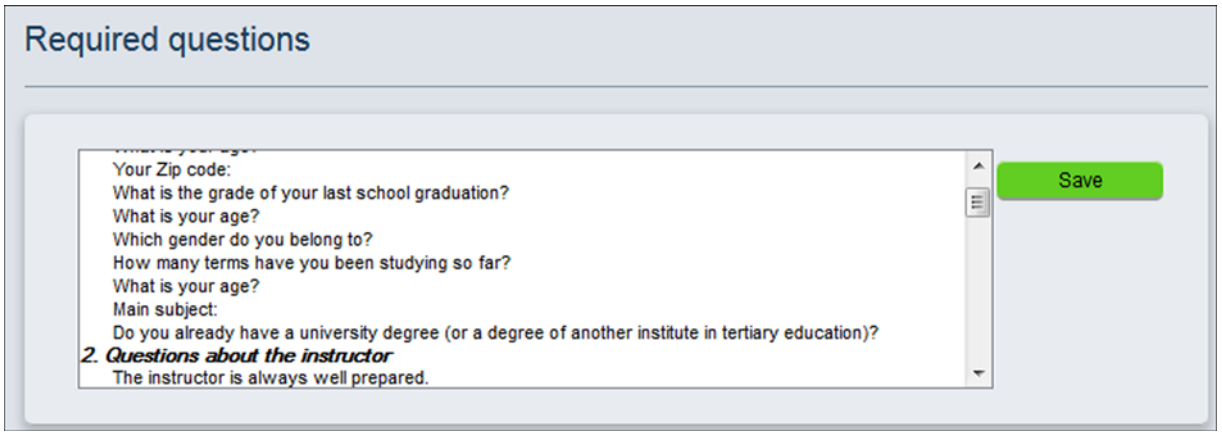
Required questions
Your Zip code:
What is the grade of your last school graduation?
What is your age?
Which gender do you belong to?
How many terms have you been studying so far?
What is your age?
Main subject:
Do you already have a university degree (or a degree of another institute in tertiary education)?
2. Questions about the instructor
The instructor is always well prepared.
Save

Figure 17: Required Questions

To define the required questions select one or multiple questions and click on [Save]. The selected questions will be displayed with a blue background.

Note:
Unlike the filter settings, required questions are not recognized in paper surveys.

3.3.4. Cross Tabulations

In order to use cross tabulations this function must be activated by the administrator.

Select from both lists the variables you would like to use. You can use scaled questions as well as single choice questions with as many as eleven choices.

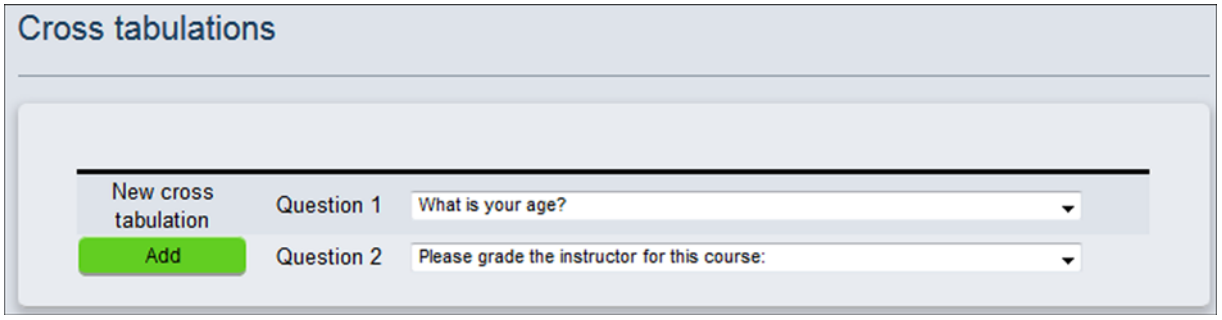

Figure 18: Create Cross Tabulations

The upper question is displayed in the X axis while the lower question is found in the Y axis of the matrix.

The number of cross tabulations possible is unlimited. In the PDF report two cross tabulations per page will be displayed.

4. Creating a Folder

After changing access dataand possibly creating a questionnaire, the active user needs to create a folder so as to work expediently. The folder structures the surveys of the user. Therefore, the structure should reflect the use of this account.

For example, the structure could be ordered by

- Evaluation period (e.g. Semester, if handling regularly recurring surveys): e.g. Surveys SS12 – Surveys WS12/13– Surveys SS13.
- Type of survey (e.g. for the case where surveys do not recur regularly): Survey research Project XY – Survey Empirical Census YZ.
- Student projects, for the cases where you allow access: Degree Dissertation John Doe – Survey Thesis Jane Doe– Survey Conferral of Doctorate Joe Bloggs

Of course, in the process, multiple structures can be combined, however tree structures are not possible (i.e. one cannot create a folder within a folder).

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To create a new folder, the active user clicks the button [Create new Folder]:

Figure 19: Creating a New Folder

In the dialog which follows, the active user is asked for the name of the new folder. At this point, he enters the name.

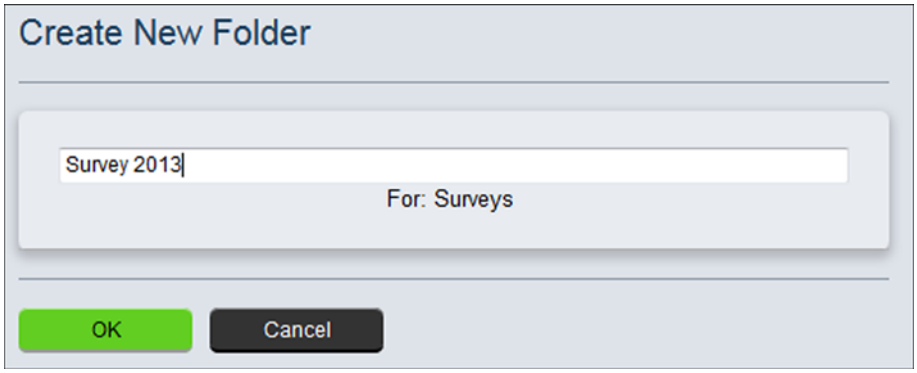

Figure 20: Creating a New Folder - Naming

After confirming with [OK], the folder appears in the list:

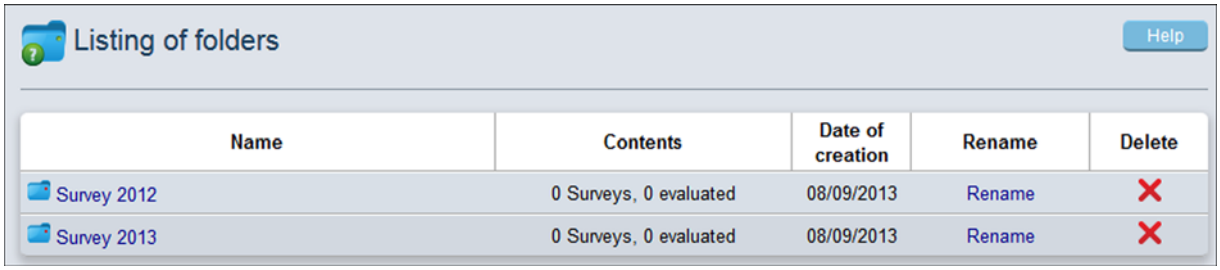

Figure 21: The New Folder in the Listing of Folders

- Any amount of folders can be created.
- Folders can be renamed at any time.
- Folders can be deleted at any time.

Note:
Attention: When deleting a folder, this includes the irretrievable deletion of all surveys and their resulting data contained therein!

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5. Creating Surveys

You can create a survey directly in a folder or via the menu "Actions/Surveys/Create Survey".

Creating a Survey in a Folder

By clicking on the folder name you get into the folder:

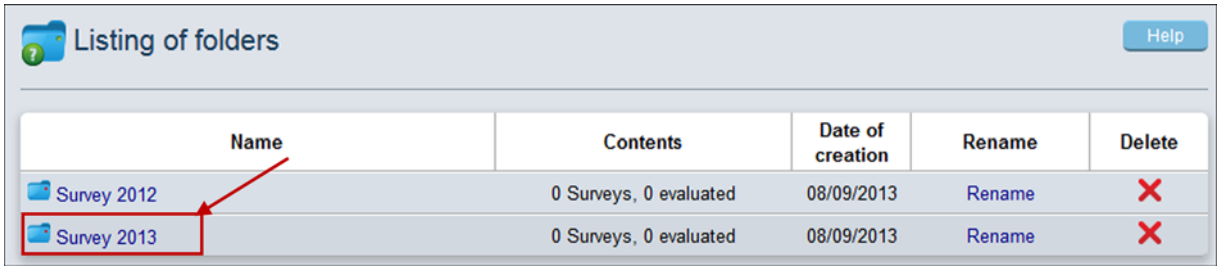

Figure 22: Accessing the Folder

Here you can create a new survey by clicking the button [Create new Survey]:

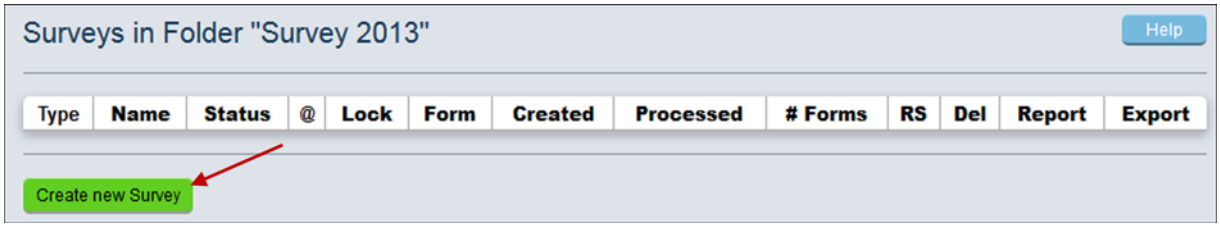

Figure 23: Creating a New Survey

Once you have clicked on the button, prompts you on the following points:

- Select the questionnaire to be used.

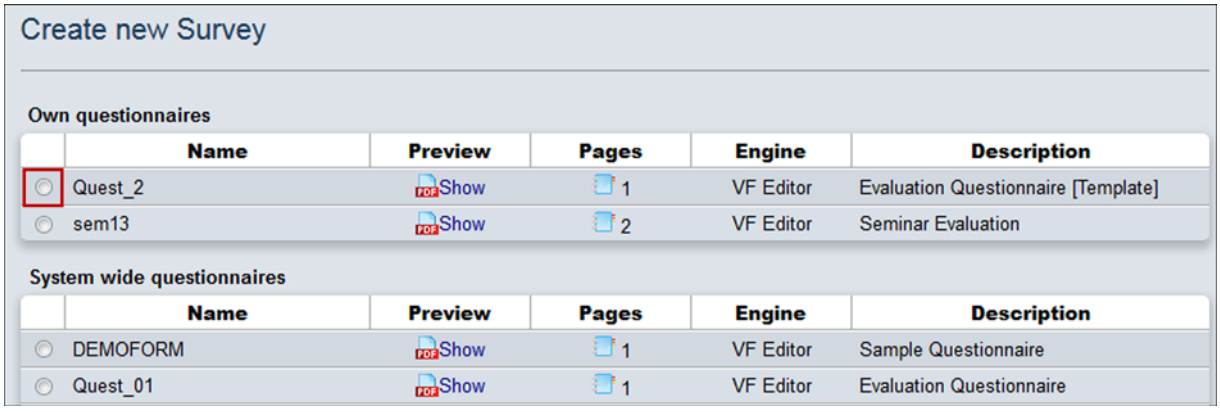

Figure 24: Choose Questionnaires

In this view your own questionnaires as well as the questionnaires which are available in the whole system are listed in separate sections. Each section is sorted alphabetically and in ascending order.

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Select the questionnaire you want to use for your survey, then, at the bottom of the list, click on [Continue>>].

Note:
If the administrator has given you the right to create your own questionnaires, then, before drawing up the survey, you can create one with the VividForms Editor, or edit a template from the administrator. These questionnaires are then displayed in the above menu beside the system-wide questionnaires made available by the administrator. To create and edit your individual questionnaires cf. the separate manual "Creating Questionnaires with VividForms"

- Enter the name of the survey

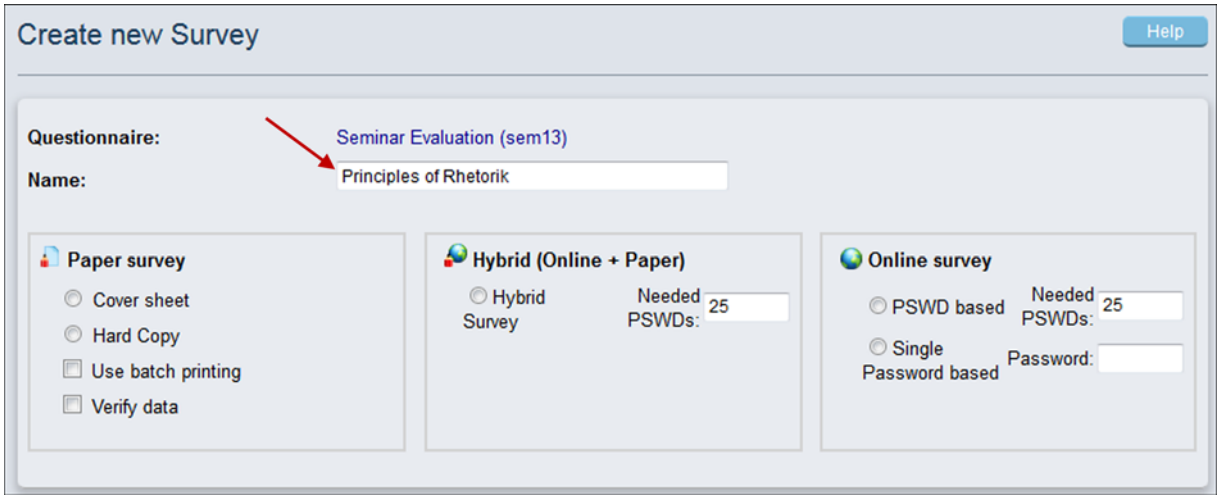

Figure 25: Select a type of survey

- Select type of survey
  - Paperbased survey
    - Cover sheet procedure
    - Hard copy procedure
    - Additional option: "Use batch printing" (only hard copy procedure)
    - Additional option: "Use verification"
  - Hybrid survey (Online + Paper) and input the required PSWDs
  - Online survey
    - PSWD-based online survey and input the required PSWDs
    - Password based online survey with indication of password

Choose one of the survey types and, if required, one or more additional options. Click on the button [Finish].

Following this, the survey is shown with the status "In progress". The questionnaire or the PSWD document can be recalled and printed or distributed. Also, the batch mailing of emails to online survey participants is possible.

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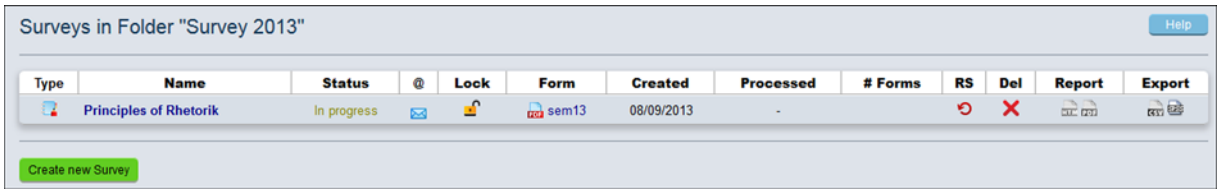

Figure 26: Newly Created Survey in the Survey List

Creating a Survey Directly

If the survey is created via the function "Actions/Surveys/Generate Survey" or via the quick start page, in the first step you are asked to select a folder or create a new folder for the survey.

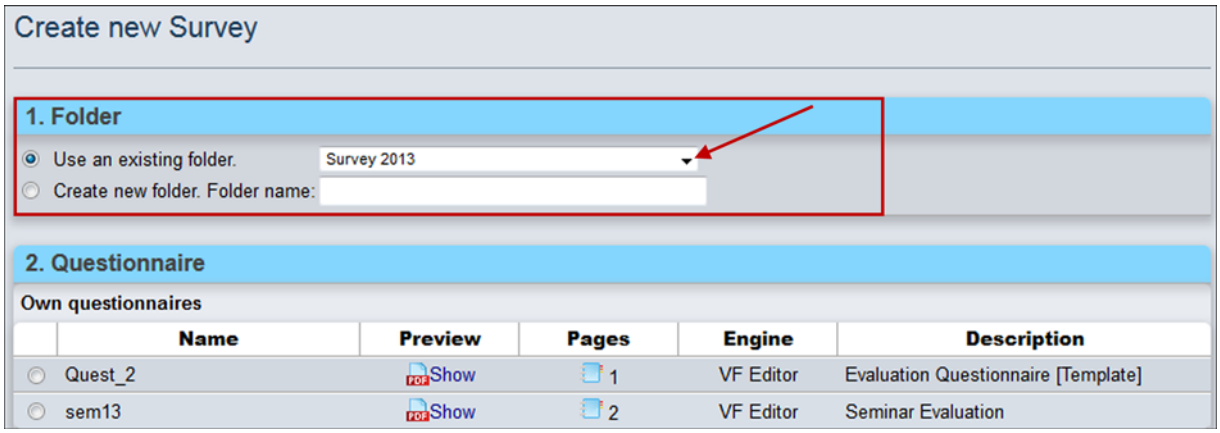

Figure 27: Generate Survey directly

You can select a folder via the drop-down menu in the folder selection.

If you want to create a new folder, you have to enter a folder name in the entry box.

The further process works analogously to the process of creating a survey in an existing folder as described above.

5.1. The Five Types of Surveys

5.1.1. Paper Based Surveys

Hard Copy Surveys

In this case, you get a personalized questionnaire in PDF format.

By means of the automatically filled header area, the barcode and the survey ID, this questionnaire can be unambiguously assigned to a specific survey.

You then have to reproduce this questionnaire yourself (-> Open the survey details by clicking on the survey name, then “Create Questionnaires”. The form is then displayed in the Acrobat Reader and can be printed via the print function.)

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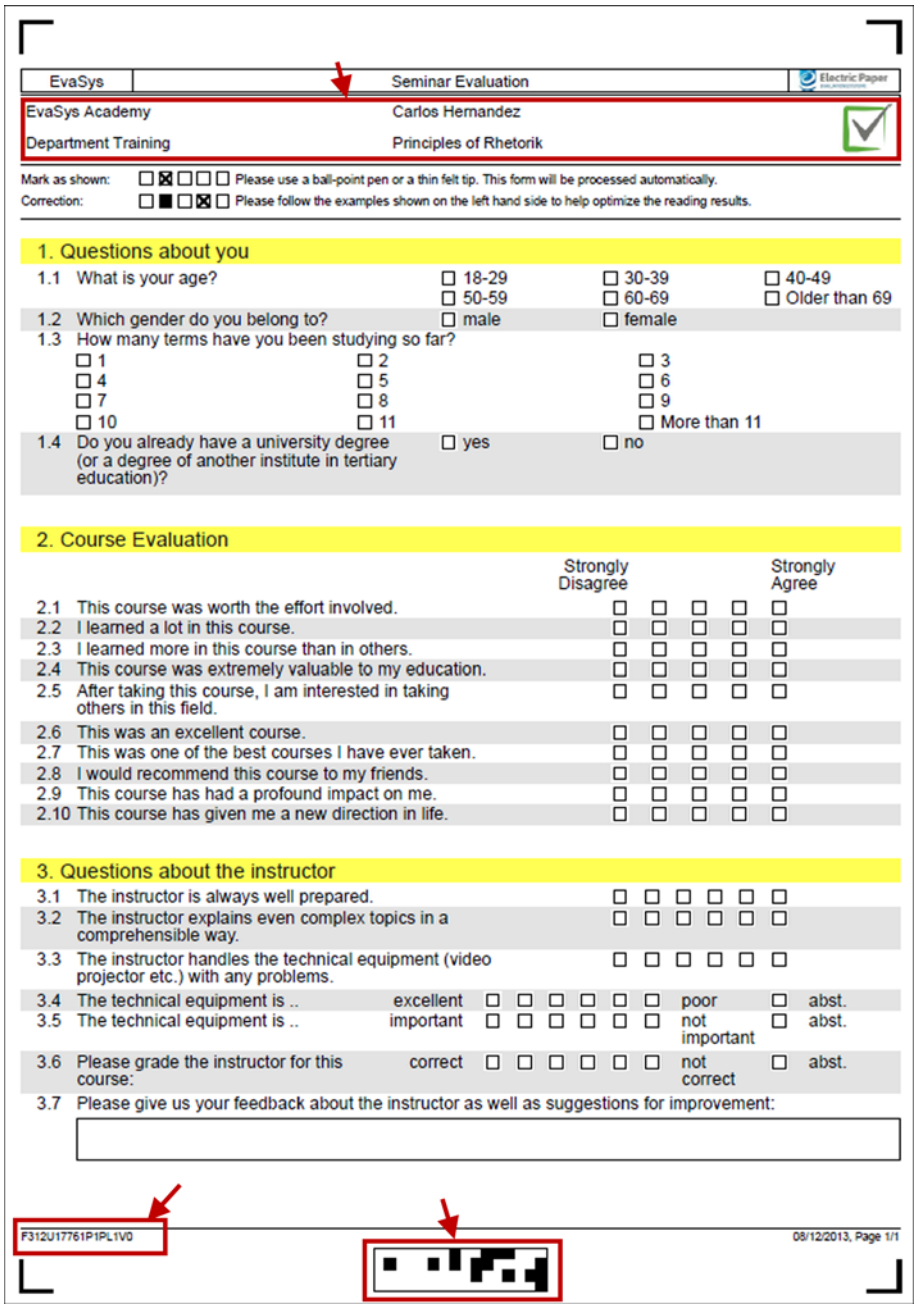
EvaSys
Seminar Evaluation
Electric Paper
EvaSys Academy
Carlos Hernandez
Department Training
Principles of Rhetorik
Mark as shown: Please use a ball-point pen or a thin felt tip. This form will be processed automatically.
Correction: Please follow the examples shown on the left hand side to help optimize the reading results.
1. Questions about you
1.1 What is your age?
18-29
30-39
40-49
50-59
60-69
Older than 69
1.2 Which gender do you belong to?
male
female
1.3 How many terms have you been studying so far?
1
2
3
4
5
6
7
8
9
10
11
More than 11
1.4 Do you already have a university degree (or a degree of another institute in tertiary education)?
yes
no
2. Course Evaluation
Strongly Disagree
Strongly Agree
2.1 This course was worth the effort involved.
2.2 I learned a lot in this course.
2.3 I learned more in this course than in others.
2.4 This course was extremely valuable to my education.
2.5 After taking this course, I am interested in taking others in this field.
2.6 This was an excellent course.
2.7 This was one of the best courses I have ever taken.
2.8 I would recommend this course to my friends.
2.9 This course has had a profound impact on me.
2.10 This course has given me a new direction in life.
3. Questions about the instructor
3.1 The instructor is always well prepared.
3.2 The instructor explains even complex topics in a comprehensible way.
3.3 The instructor handles the technical equipment (video projector etc.) with any problems.
3.4 The technical equipment is .. excellent poor abst.
3.5 The technical equipment is .. important not important abst.
3.6 Please grade the instructor for this course: correct not correct abst.
3.7 Please give us your feedback about the instructor as well as suggestions for improvement:
F312U17761P1PL1V0
08/12/2013, Page 1/1

Figure 28: Questionnaire of a Hard Copy Survey

Cover Sheet Survey

The cover sheet procedure is favored when numerous surveys are conducted repeatedly with the same questionnaire. In this case, a “blank version” of the questionnaire can be used. The personalized areas of the questionnaire remain un-filled, and the barcode only contains information about which questionnaire it is and the questionnaire page in question.

Therefore, in this case, the correlation of the survey must follow by means of a cover sheet (which is automatically generated when creating cover sheet surveys). This cover sheet contains all relevant information to this specific survey. It must be scanned as the first page together with the respective batch of questionnaires. This is because during capturing, the cover sheet serves as a reference to the survey process.

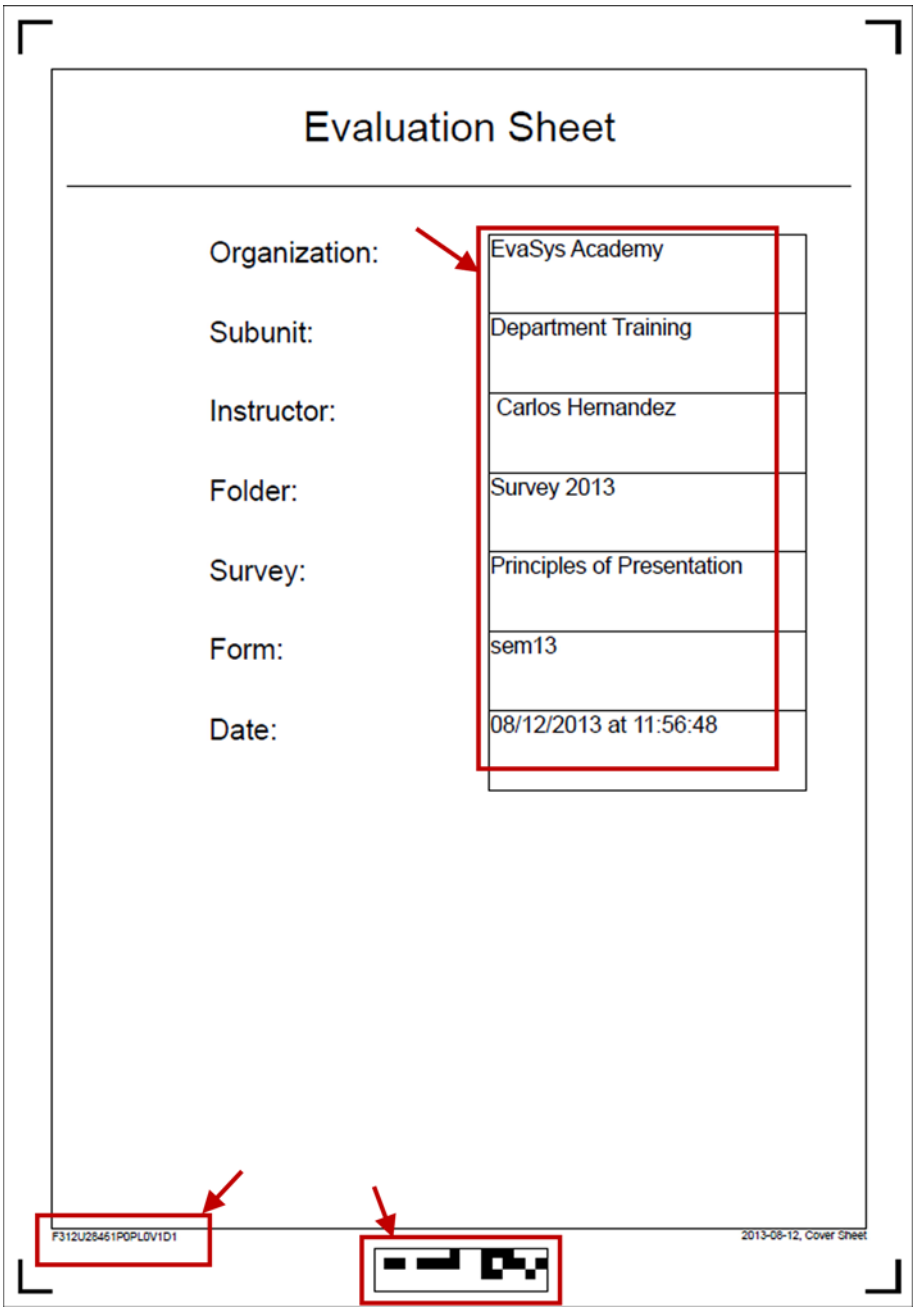

Figure 29: Cover Sheet

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5.1.2. Online Surveys

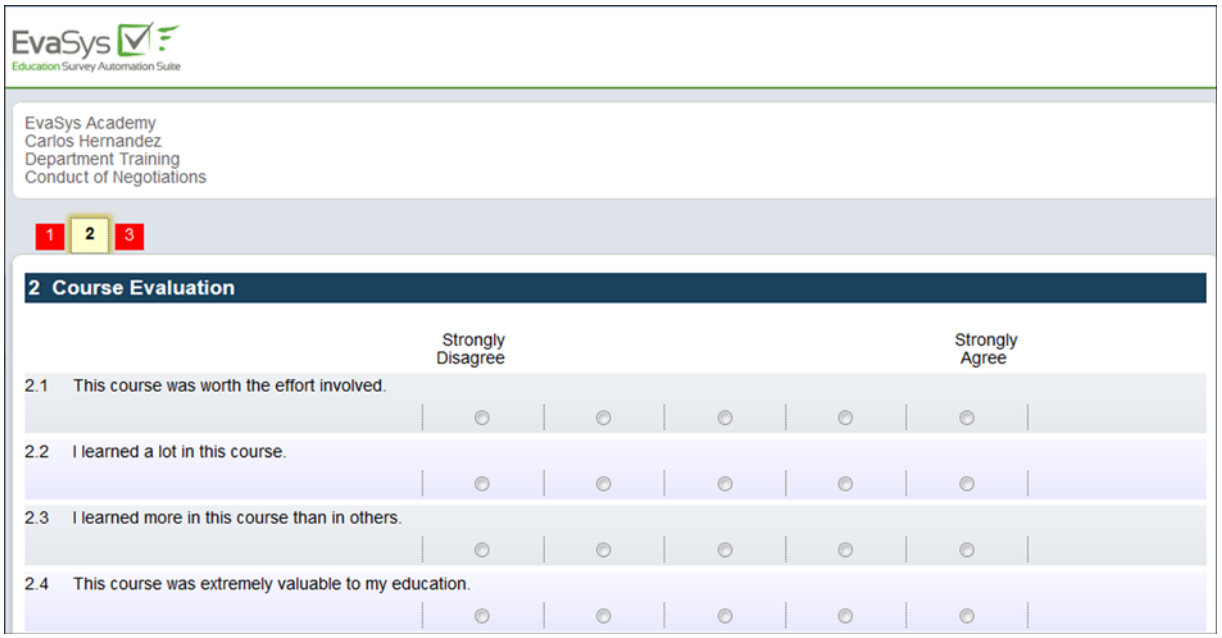

Figure 30: Online Surveys

Online surveys are only possible as HTML surveys. When creating an online survey, the HTML questionnaire is automatically generated according to the layout of your questionnaire. For this an online template is used which the administrator has assigned to your subunit.

PSWD Based Online Surveys

With PSWD based surveys, you can define a specific number of PSWDs based on the expected number of participants. There are from 1 to 1000 (and more) available. By means of these PSWDs, the one-time completion of the survey is enabled. Should one waive the PSWDs, it would not be possible to avoid participants completing surveys more than once.

Password Based Online Survey

In a “password based” survey, you define a general password for all participants, a password consisting of at least 5 and up to a maximum of 25 characters.

Note:
Participants can vote numerous times during password surveys. In extreme cases (sabotage by one or more participants) the collected data may be unusable.

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5.1.3. Hybrid Surveys

You can use hybrid questionnaires to create surveys which are both online and on paper. The participants can take part using both mediums; they receive a paper questionnaire as well as a PSWD to participate in the questionnaire online. The PSWD and paper questionnaire are linked to each other. If the PSWD has been used, the data from the paper questionnaire is not evaluated, and vice versa.

The paper questionnaire and PSWD must be connected during the questionnaire creation process, by integrating a placeholder for the PSWD and URL into the header of the questionnaire. You should therefore add rows to the questionnaire header if necessary, and add the placeholders [PSWD] and [SERVER] to the header. You may want to include an explanatory text. You can also exchange the logo in the questionnaire header for a QR Code, if so desired. Participants with mobile devices are then able to scan in the QR Code and access the online survey using their mobile device.

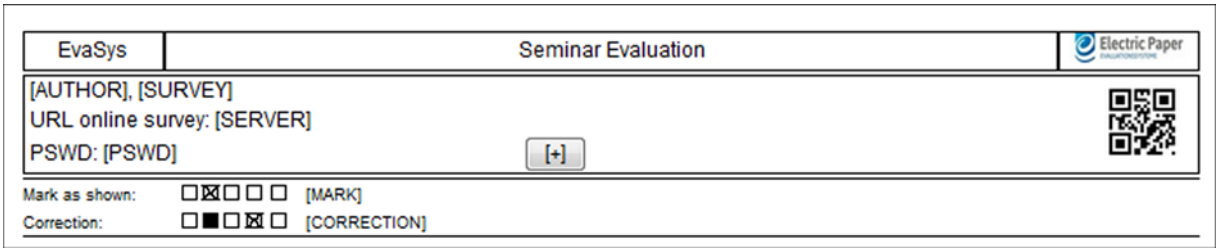

Figure 31: Questionnaire Header with QR Code

Note:
A hybrid questionnaire is only useful if the paper questionnaire includes a placeholder for the PSWD!

Once the hybrid questionnaire has been created using the menu “Generate Surveys” in the main menu “Subunits”,it will appear in the survey list. You can recognize the hybrid questionnaire by its icon, a combination of a globe and a pencil:

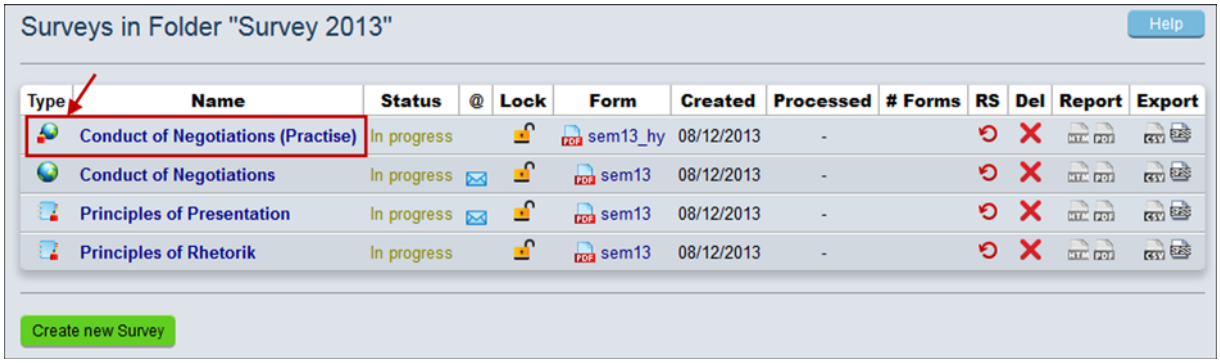

Figure 32: View Hybrid Survey

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Click on the name of the survey to access the survey details. You will see a variety of options for printing the questionnaire and/or sending PSWDs. There are two basic ways to carry out a hybrid survey:

- Send the PSWDs to participants; the paper questionnaire is attached to the email to print out as an alternative option
- Distribute paper questionnaires to the participants; the PSWD for filling out the survey online is printed on the questionnaire

To send the PSWDs to participants via email, click “Send PSWDs to the Participants via Email”. The survey participants will then receive an email which contains information on the online survey as well as the paper questionnaire:

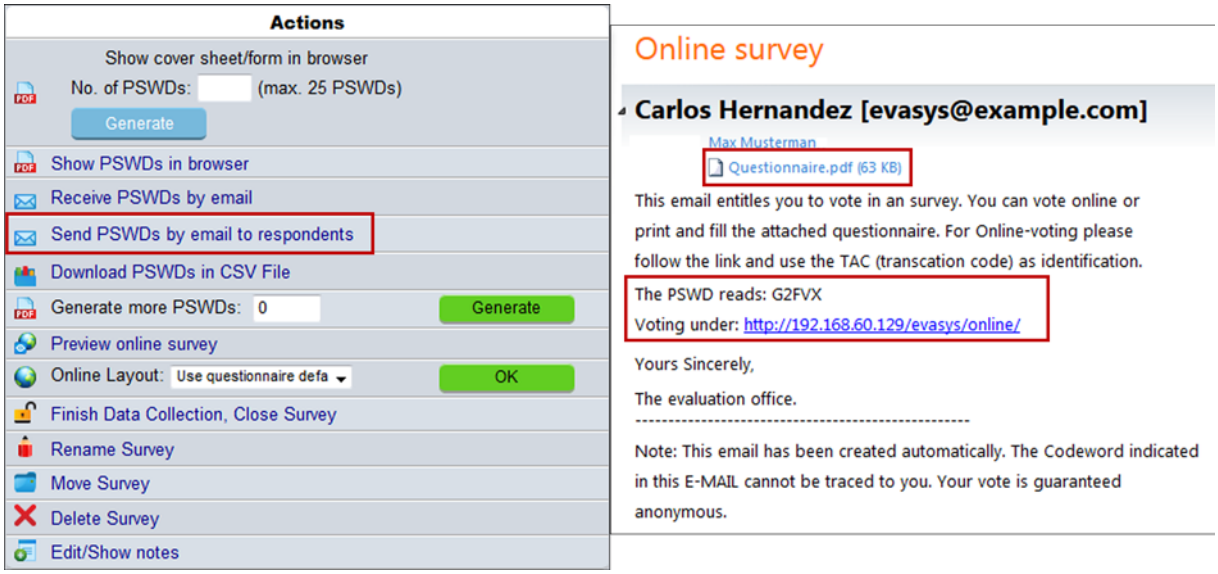
Actions
Show cover sheet/form in browser
No. of PSWDs:
(max. 25 PSWDs)
Generate
Show PSWDs in browser
Receive PSWDs by email
Send PSWDs by email to respondents
Download PSWDs in CSV File
Generate more PSWDs: 0
Generate
Preview online survey
Online Layout: Use questionnaire defa
OK
Finish Data Collection, Close Survey
Rename Survey
Move Survey
Delete Survey
Edit/Show notes
Online survey
Carlos Hernandez [evasys@example.com]
Max Musterman
Questionnaire.pdf (63 KB)
This email entitles you to vote in an survey. You can vote online or print and fill the attached questionnaire. For Online-voting please follow the link and use the TAC (transcation code) as identification.
The PSWD reads: G2FVX
Voting under: http://192.168.60.129/evasys/online/
Yours Sincerely,
The evaluation office.
Note: This email has been created automatically. The Codeword indicated in this E-MAIL cannot be traced to you. Your vote is guaranteed anonymous.

Figure 33: Hybrid Questionnaire - Sending PSWDs and Questionnaires via Email

To send the questionnaire, enter the number of PSWDs needed for the combined paper and online questionnaire in “Cover Sheet/Display Questionnaire”, and click on [Show]. The page will reload and you will see a [Download] button, which will allow you to open a zip file which contains a PDF questionnaire for every participant (this number is the same as the number of PSWDs required). The questionnaires can now be printed and distributed to the participants.

Note:
The placeholder in the header of the PDF questionnaires ensures that each questionnaire contains a PSWD; each questionnaire also has a serial number. In combination, the PSWD and serial number ensure that the participant can only fill out the survey in one medium (paper or online). Questionnaires cannot be copied, as this would create duplicate PSWDs and serial numbers. Always print the questionnaires!

You can access the PDF report as well as the raw data for the hybrid survey once it is complete. The CSV raw data shows which medium participants used to fill out their questionnaires (Paper = P, Online = O, Online with mobile device = M).

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5.2. Extra Options

5.2.1. Questionnaire Numbering/Using Batch Printing

If the option of batch printing is selected, every questionnaire receives a unique number. This is expedient if the questionnaire consists of more than two pages and where the questionnaire, in duplex (double sided) printing, encompasses more than one page of paper.

In this way, the logical cohesion of the quire is guaranteed, even if the questionnaires are mixed up whilst being collected.

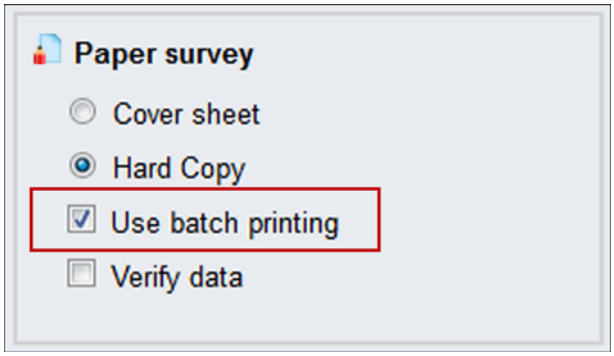

Figure 34: Use Batch Printing

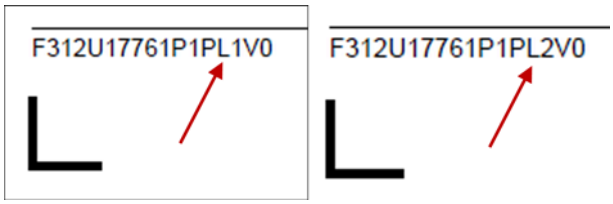

Figure 35: Questionnaire Numbering and Page Link

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5.2.2. Verify Data

This option is available in both cover sheet and batch printing procedures. The verification serves to enable the checking, and if needed the correcting, of contentious reading results from the VividForms Reader. A reading result is contentious, for instance, when several items have been marked though only one answer is allowed to a question, or when an answer item has only been slightly darkened etc.

If this option is not activated, the VividForms Reader “decides” on unclear ticks in boxes by means of the threshold settings.

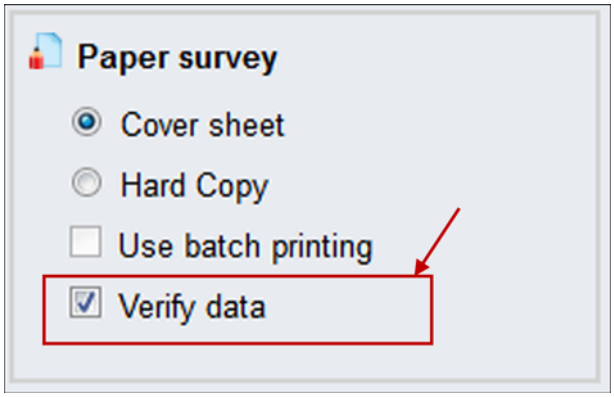

Figure 36: Use Verification

For the exact carrying-out of verifications, see chapter 2 6.2.4. "Verification".

6. Administrating and Conducting Surveys

In the folder view, all surveys are displayed. Here you already have fast access to several functions. A mouse click on the survey name takes you straight to the survey details, where you have access to all functions concerning this survey.

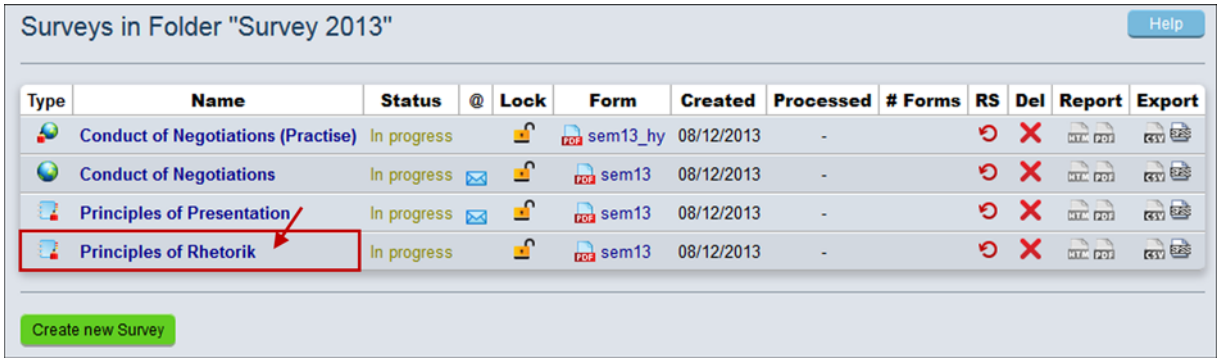

Figure 37: Folder View

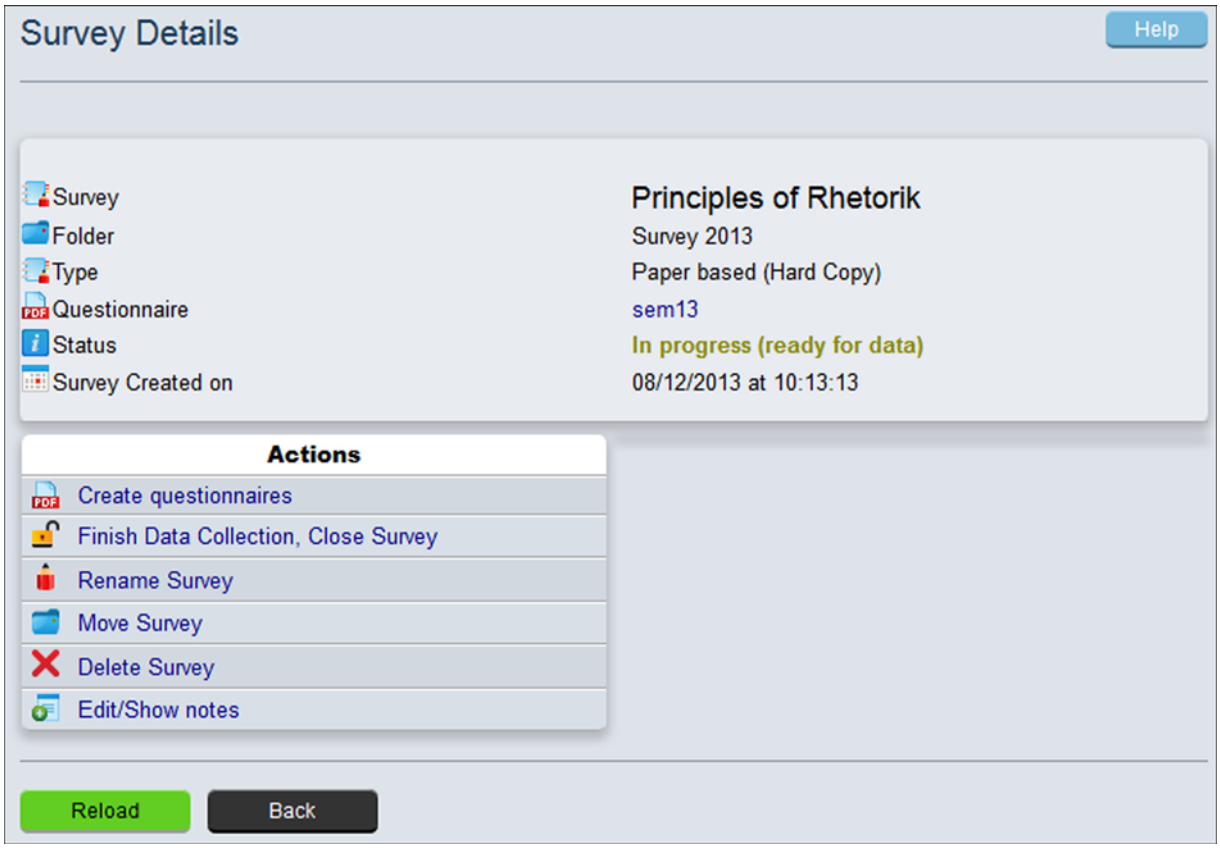

Figure 38: Details for Survey (Hard Copy)

Some functions can only be reached via this details view. Depending on the status of the survey (e.g. ready, data available), the type of survey and properties specific to this questionnaire or survey (e.g. language, PSWD status), different details of the survey are provided, as well as different functions are shown.

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The header data of the survey is displayed in the upper area of the details screen.

Survey

The name of the survey appears here.

Folder

The name of the folder to which the current survey is assigned.

Type of Survey

There are three types of survey:

- Online survey (PSWD procedure or Single Password survey)
- Paper survey (Cover Sheet procedure or Hardcopy procedure)
- Hybrid survey (Combination of Paper and Online survey)

Number of PSWDs (only Online and Hybrid Surveys)

Number of available and generated PSWDs

Questionnaire

The name of the questionnaire used. Click on the questionnaire name to display it, when dealing with a cover sheet survey

Status

Surveys can have three statuses. A newly generated survey receives the status **"In progress"**. This means that EvaSys is waiting for the forms to be captured. As no result data is at hand when in progress, no evaluation can be shown.

When the questionnaires of a survey have been filled out and scanned in, or when votes have been submitted in online surveys, this is shown by the status **"Data available"**. The raw data gained by form capturing is transferred by EvaSys into the database and initial statistical calculations have already been conducted.

However, this is only the case if verification was not activated for this survey. Should the correction function have been activated, the status is set to **"Verification"**. The raw data is transferred to EvaSys after completion of the verification.

After evaluation, you can have the data automatically deleted: To do this, go to the menu "Configuration" on the left and under "Keep survey data alive after automatic reporting?" select the option "No". In this case, after evaluation, the status of the survey is shown as **"Data deleted"**. The results of the survey are no longer available on the EvaSys server. You have automatically received an email of the evaluation after the scanning process.

Survey created on

The date on which the survey was created.

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Last data collection on

The date on which data was last received.

No. of collectedquestionnaires

The number of captured questionnaires is displayed here. A multiple paged questionnaire is valued as “1”. In online surveys, the number of responses appears behind this number.

Notes (if available)

The last note on the survey registered is displayed.

6.1. Actions in a Survey

In the bottom left area different actions regarding surveys are available, and on the bottom right you can – as soon as data is available – select reports and export formats.

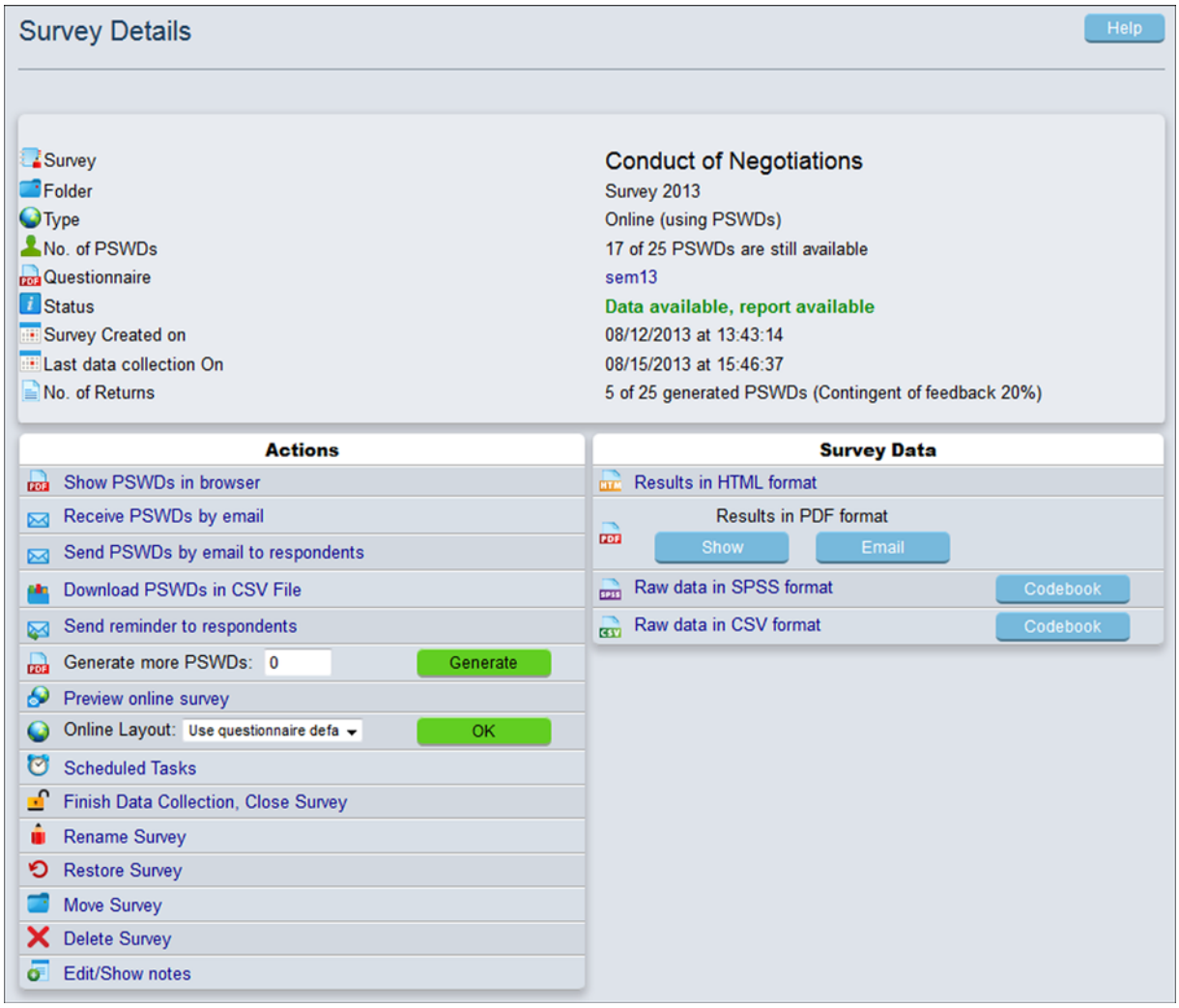

Figure 39: Details of an Online Survey

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Paper Based Surveys

- **Generate questionnaires (Hard Copy Procedur)**

The new window contains the information how much questionnaires already printed and the input box for the number of questionnaires to print.

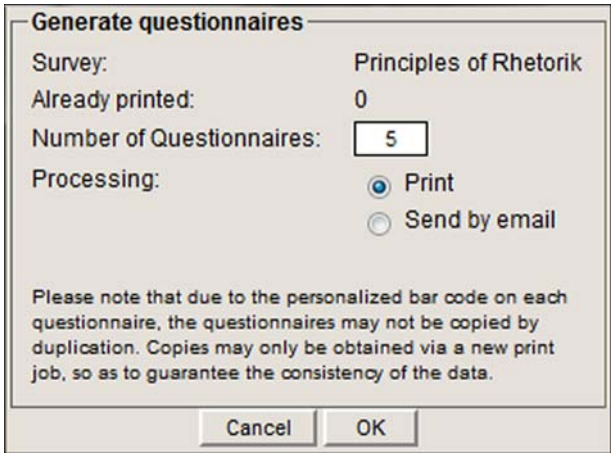
Generate questionnaires
Survey:
Principles of Rhetorik
Already printed:
0
Number of Questionnaires:
5
Processing:
Print
Send by email
Please note that due to the personalized bar code on each questionnaire, the questionnaires may not be copied by duplication. Copies may only be obtained via a new print job, so as to guarantee the consistency of the data.
Cancel
OK

Figure 40: Generate questionnaires

You can decide if you print the generated questionnaires or send it by email.

- **Show cover sheet /form generate/send (Cover Sheet Procedur)**

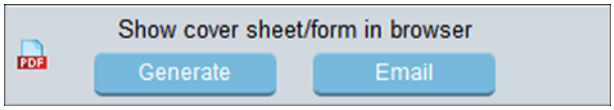

Figure 41: Show cover sheet/form generate/send

In subject to the configuration settings you can download the individual cover sheet and the questionnaire.

The function “Email” sends the cover sheet or the questionnaire as an attachment to the email address noted in your user profile.

Online Surveys

- **Show PSWDs in a browser**

The PSWD sheets are accessible here. Click on the text [Show PSWDs in browser]. If the online survey is already active, this function only shows the number of PSWDs not yet used.

- **Receive PSWDs by email**

This function sends an email with a PDF attachment containing the PSWDs to the email address noted in your user profile.

- **Send PSWDs by email to respondents**

Click on this option to send PSWDs by email to target groups.

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- **Download PSWDs in CSV file**

A CSV file with all PSWDs is created and offered for download.

- **Generate more PSWDs**

Should you require further PSWDs for the survey, you can specify the required amount here and create them by clicking on [OK]. The PSWD sheet with all PSWDs is then created. With newly generated PSWDs, PSWD-charge 2 is shown in the header of the PDF document.

- **Preview Online Survey**

Here you can preview the layout of the online survey.

- **Scheduled Tasks**

You can control the process of the online survey with “Scheduled Tasks”. There are three actions which can be chronologically controlled:

- Start the survey and send PSWDs to participants by email.
- Send participants a reminder by email (incl. PSWD).
- Close the online survey and, where necessary, submit the evaluation reports by email to the user.

All Survey Types

- Data collection

A small padlock appears:

- Open Lock - Survey is currently open
- Closed Lock - Survey is currently closed

With a mouse click on the text, the respective status can be switched. If data collection has been closed you can consider the survey finished, as the results can no longer change. Any further form data which is received marked for this survey is ignored and deleted. If you again open the padlock further forms can be scanned or, in online surveys, further responses can be captured. The data is accumulated.

Rename Survey

You can rename the survey – if, for example, you realize you have already created a survey with the same name. Simply click on “Rename Survey” and enter the new name. Confirm the new name by clicking on the [OK] button.

Restore Survey

If, for whatever reason, data for a survey was captured incorrectly, this command allows you to delete the result data already present in the database. In this way, you bring the survey back to its original state.

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Move Survey

At any time, you can move surveys you have created from one folder to another. To move a survey, click on the folder containing the survey you wish to move. Then click on the name of the survey you wish to move. You will automatically be directed to the details of your survey. There, click on the option “Move Survey”. Now the survey can

- either be moved to an existing folder, by selecting the relevant folder from the drop down list in the area “Folder”
- or you create a new folder. Enter the name of the new folder in the area “Create in a new folder”. In both cases, confirm moving the survey by clicking on the [OK] button.

Delete Survey

This command deletes all data connected with the selected survey. Before executing this command, you should ensure that the raw data and the evaluation file of the survey are saved on your computer. Deleting a survey in EvaSys is irrevocable and cannot be restored.

Request certificate for evaluation

This command shows a PDF document in a new window which can be used as a certificate for conducting an evaluation. This option is only displayed if the administrator has activated the function in the system settings.

Request certificate of results

This command displays a PDF document in a new window that can be used to certify that an evaluation has been carried out. In contrast to attendance certificates, this document also shows the average values for the question groups located in the questionnaire (i.e. the indicators). This option is only displayed if the administrator has activated the function in the central system settings.

Edit / Show Notes

This function is particularly expedient in the context of the QM views. The instructor is able to make a response to the calculated results. Deans or subunit heads can then see these notes as well as supplying their own.

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To add a note to a survey, call up the survey details by clicking on the survey name. Then click on [Edit/Show Notes]:

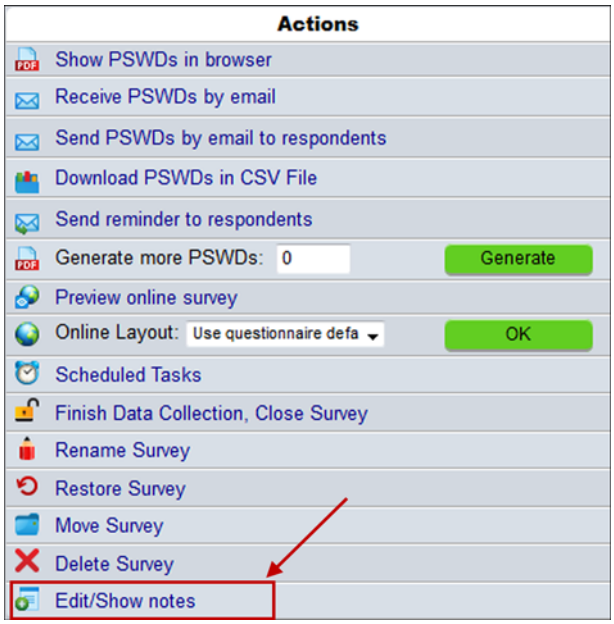

Figure 42: Survey Details: Edit Notes

After this, click on [Add note]:

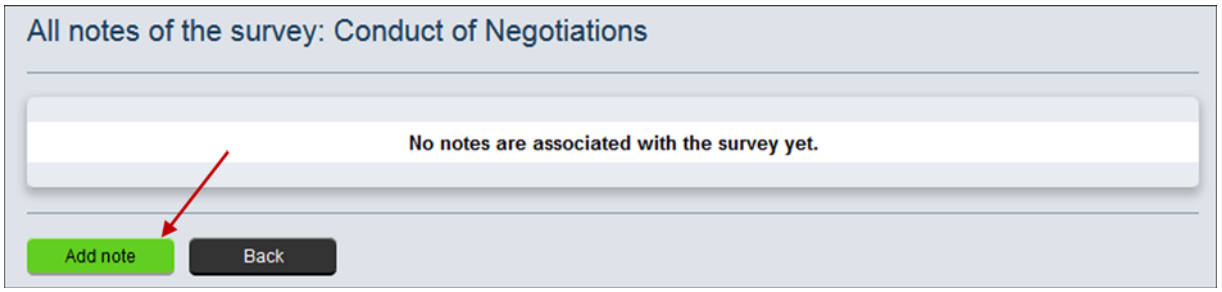

Figure 43: Add Note

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An input dialog appears where the note can be entered:

Figure 44: Editing a Note

After clicking on [Save] the input is saved. Now the notes symbol appears in the survey details next to the survey name. If the mouse is rolled over the symbol, the most recent note appears in a window next to the mouse pointer:

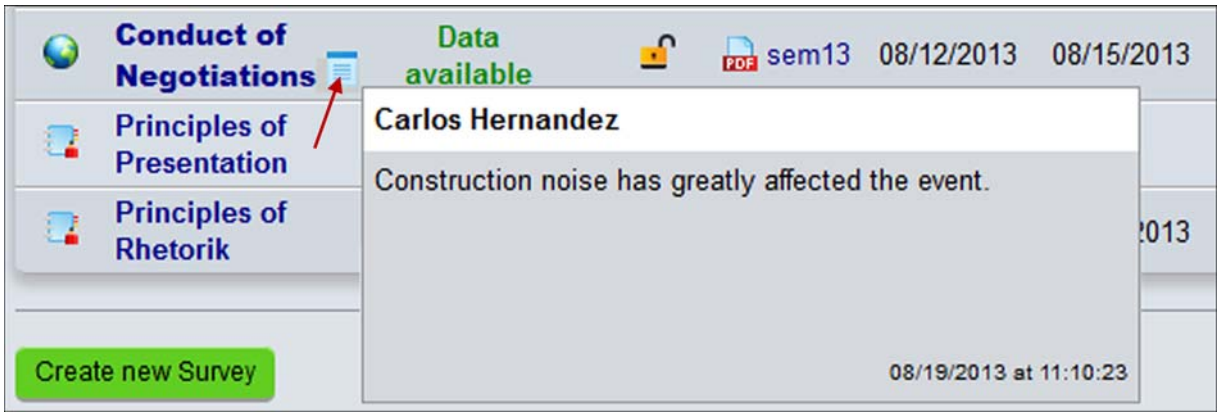

Figure 45: Survey with Note

The notes are also displayed in the QM Views resp. can be added at the end of the survey list. Only the author of a note is allowed to edit it retrospectively.

Additionally, these notes can be shown in the PDF report, if the administrator has activated the option “Show notes in the PDF report” under “System Settings/Report Settings/Configuration”.

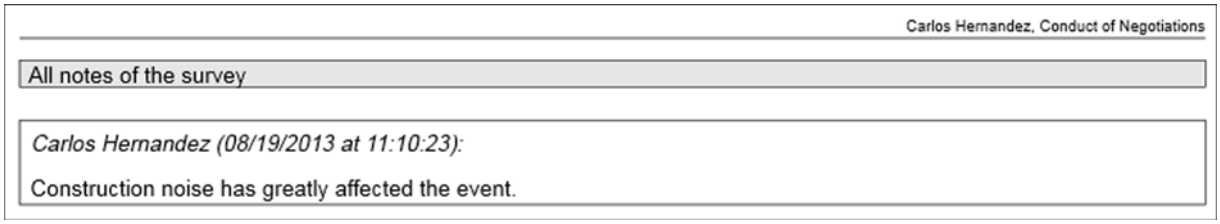
Carlos Hernandez, Conduct of Negotiations
All notes of the survey
Carlos Hernandez (08/19/2013 at 11:10:23):
Construction noise has greatly affected the event.

Figure 46: All notes of a Survey in the PDF Report

6.2. Managing and Conducting Paper Based Surveys

6.2.1. Printing Questionnaires

Cover Sheet Procedure

When using the cover sheet procedure, the questionnaires can be produced in a print shop and called up on demand for surveys.

You can call up the PDF in the survey overview or in the survey details.

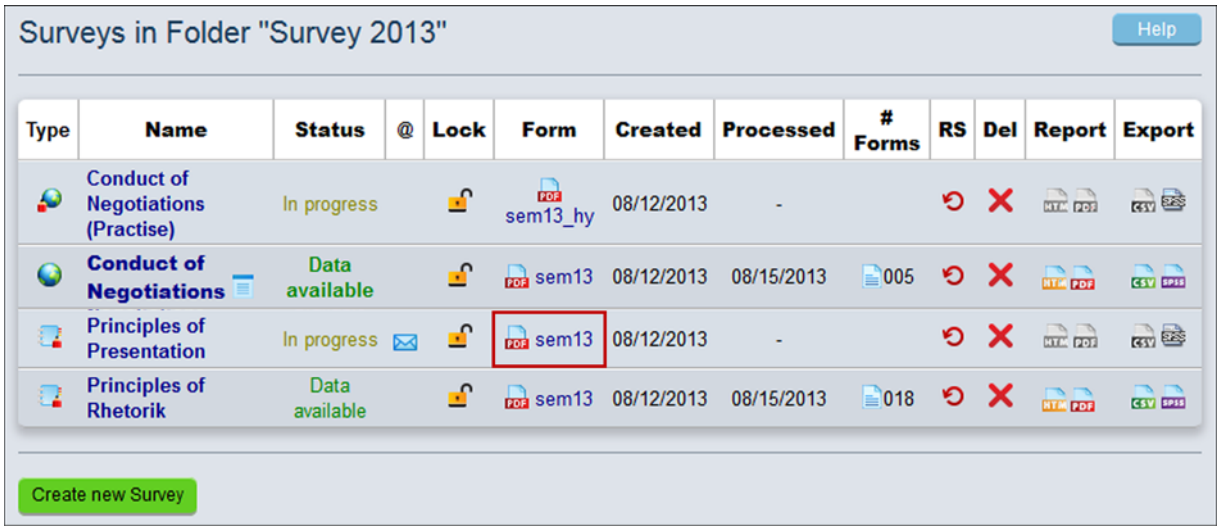

Figure 47: Calling Up the Questionnaire in PDF Format

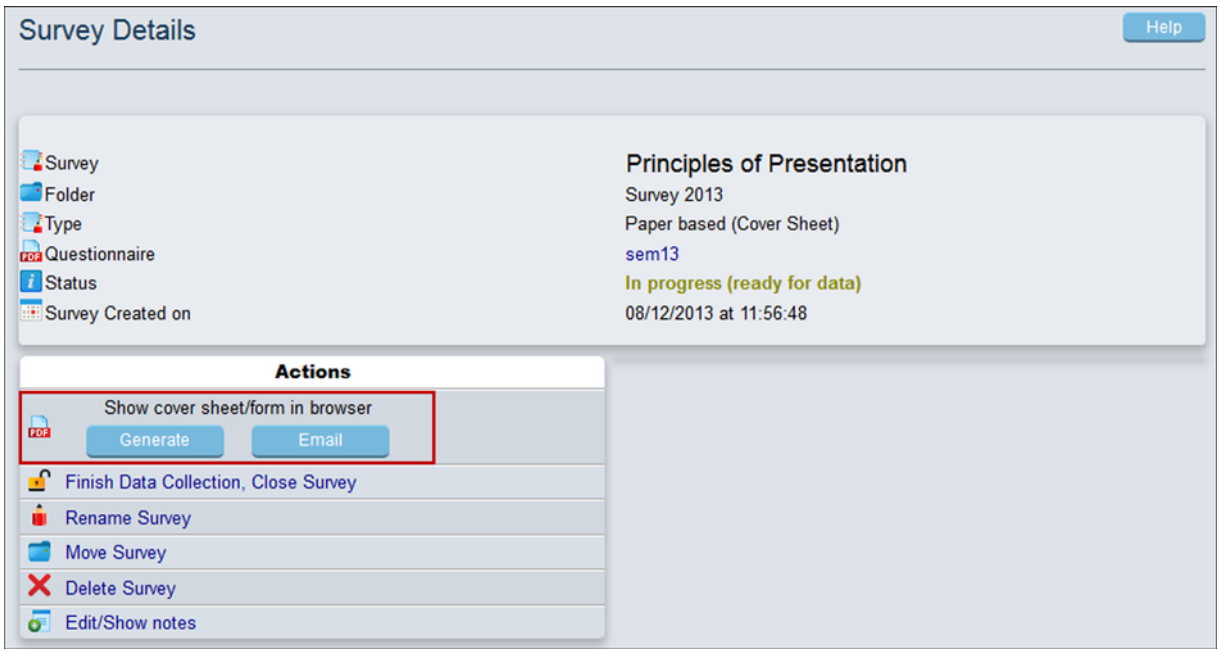

Figure 48: Calling Up the Cover Sheet in PDF Format

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Hard Copy Procedure

In the hard copy procedure, questionnaires personalized for individual surveys are printed from the details of the survey or the survey list, or the PDF file is recalled so as to be passed on to the print shop.

Document Quality

The quality of the paper used as well as the print image itself is a key factor in the subsequent scanning and processing. You should refrain from making copies, questionnaires should always be printed!

We advise against using gray recycled paper or colored paper due to the gray shading that occurs.

When producing questionnaires on non-commercial printers or copiers, please ensure that the printer driver is set to A4 and there is no page scaling (i.e. options such as “fit to page” must be deactivated).

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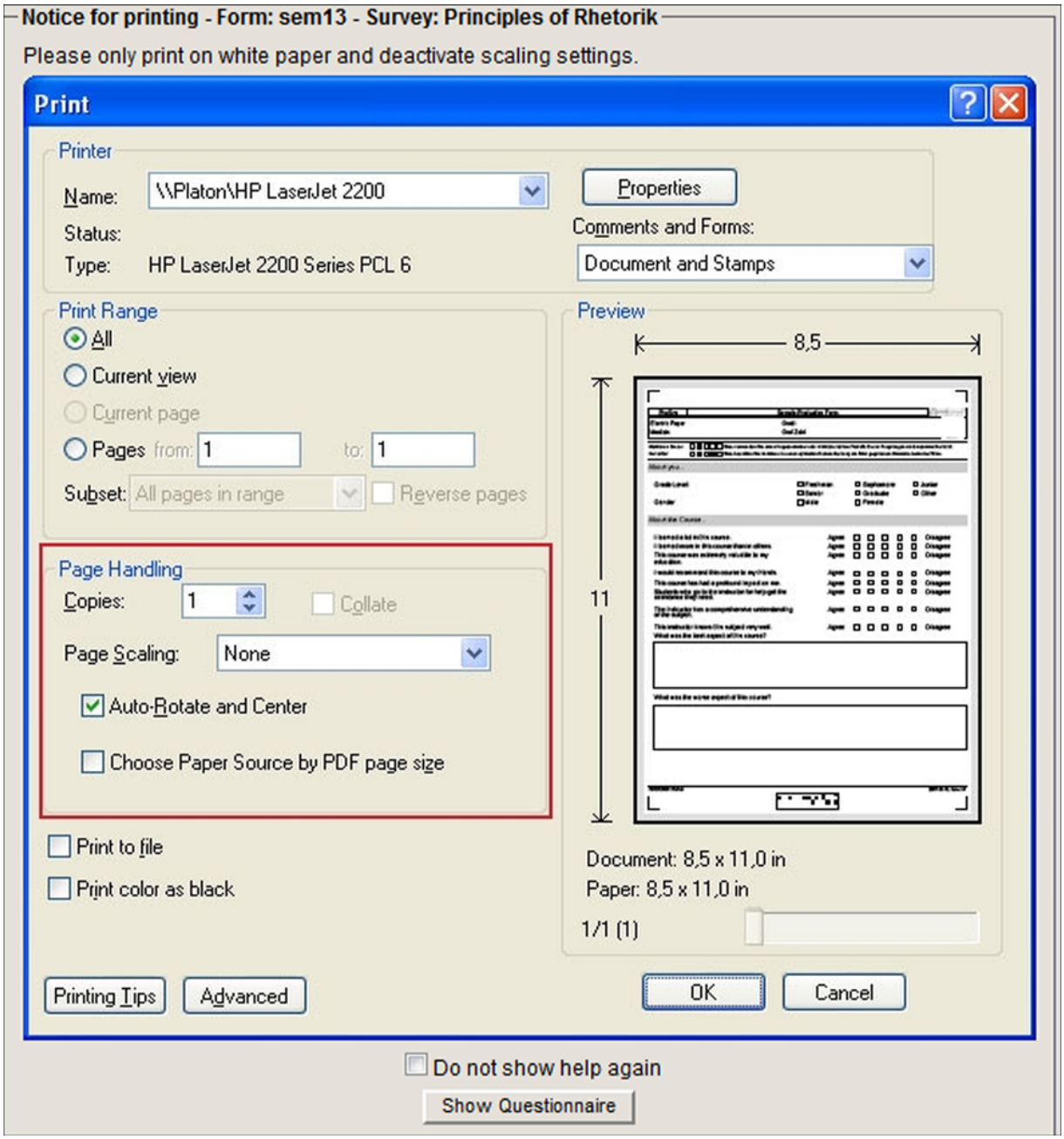

Figure 49: Print Options

6.2.2. Scanning Questionnaires

Capturing is conducted with the “EvaSys Scanstation” software.

After a few configuration settings, this software can be used on PCs where a document scanner is connected via SCSI or USB. Communication with the scanner takes place via the TWAIN protocol.

For other settings please refer to the scanstation manual or contact support.

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Fundamental Guidelines for Scanning

Before beginning the scan process, please ensure that the following conditions are met:

It is recommended capturing only those questionnaires from one survey in one scan operation. These returns of a survey are known as a batch.

If there are more forms at hand than fit into the feeder, the next part of the batch is fed in after reading the first and the scan process is continued.

Place the forms in the feeder as shown in the illustration.

Figure 50: Correctly inserted questionnaires

In the cover sheet procedure, the cover sheet must be scanned first.

The quires should be sorted in order and , if the forms consist of more than one page each, always be scanned on both sides.

Should multiple page questionnaires get mixed up, processing is still possible and the end result remains coherent. In this case however, correct results of an evaluation based on subgroups can only be achieved by using questionnaire numbering in the batch events.

Now start the scanning process. As a rule capturing is done in duplex, so the front and rear of each page is scanned at the same time, each being counted as one page. Therefore, if you scan 12 pages each printed on one side in duplex, the following dialog appears reporting that 24 pages have been captured. Empty pages are automatically deleted; there are no adverse effects to the capturing.

If you wish to capture more batches, select [Continue scanning].

If you have finished scanning, select [Finish batch]. The scanned forms are transmitted to the EvaSys server, further evaluation continues automatically. To scan further surveys, click once more on [Scan] in the main window.

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If the scanning process contained errors, click on [Discard batch] to wipe out the data of the current scan process and repeat the capturing as a new scanning process.

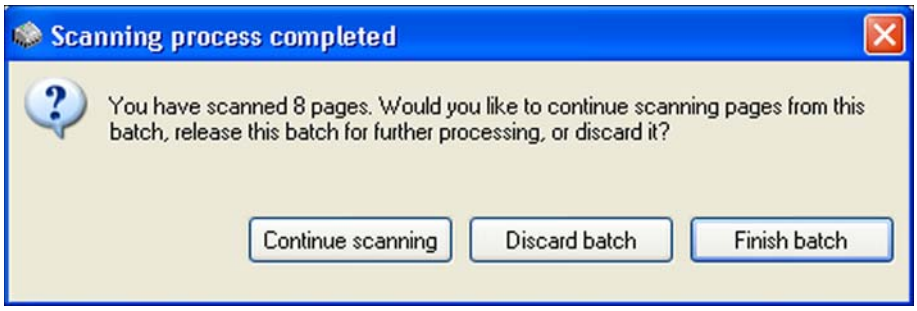
Scanning process completed
You have scanned 8 pages. Would you like to continue scanning pages from this batch, release this batch for further processing, or discard it?
Continue scanning
Discard batch
Finish batch

Figure 51: Batch confirmation dialog

6.2.3. Reading the Questionnaires

The scanned batch is processed using the VividForms Reader. The Reader is already usually running on the server and must not be additionally started by the user. The processing is fully automatically.

Items that have been filled in are recognized by the barcode on the questionnaires and on the cover sheet, and also by OMR (OMR = Optical Markup Recognition).

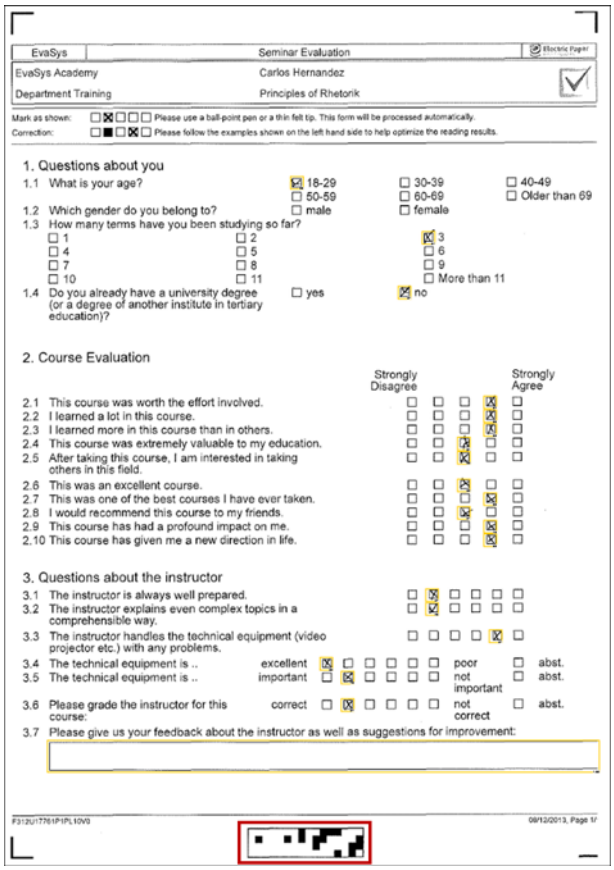

Figure 52: Barcode and OMR Reading Zones

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The information on the questionnaires and the survey contained in the barcode assigns the scanned questionnaires to the correct survey in the system.

The check boxes and open questions are processed via OMR recognition. To do this, the density of shading in a particular reading zone is read. Based on predefined thresholds, the system decides whether a cross is valid or whether the blacking out of the check box denotes a correction. The open question areas are also analyzed for significant density and subsequently saved as an image file. These image files are then integrated into the PDF reports.

6.2.4. Verification

To correct uncertain marking of boxes the verification module is available, as long as verification was selected as an option when creating the survey. After having scanned the questionnaires, the status “Web Verification” appears in the survey status folder.

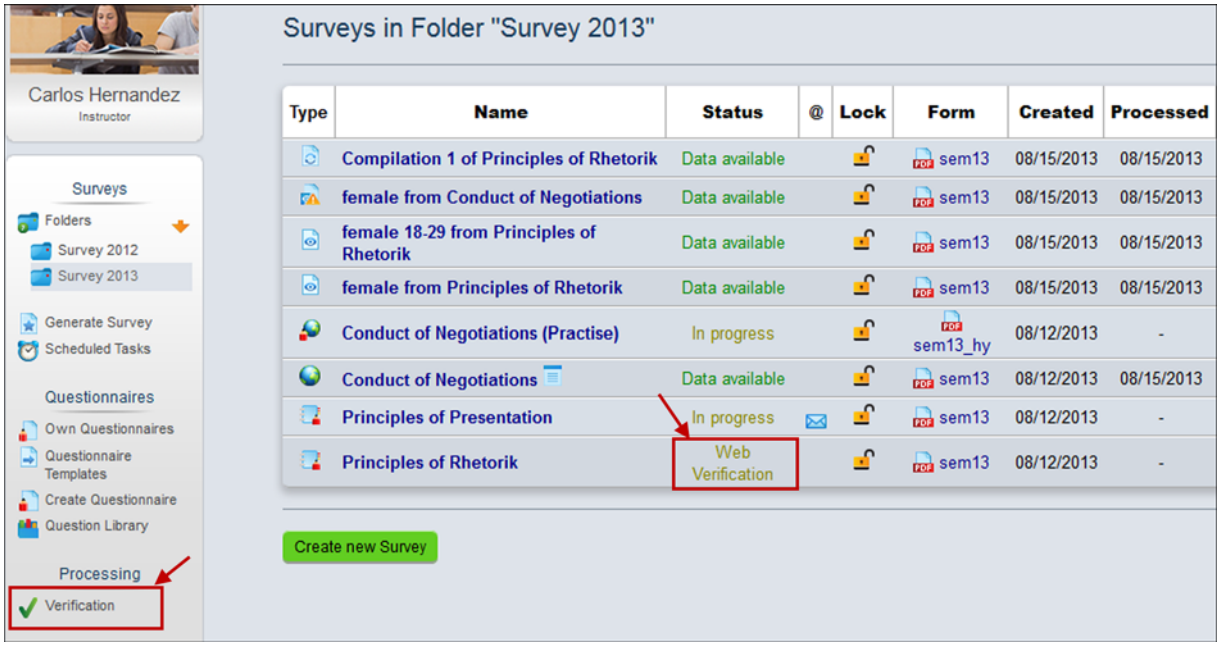

Figure 53: Verification

By clicking on the menu entry “Verification”, an overview of the current surveys in the verifier appears.

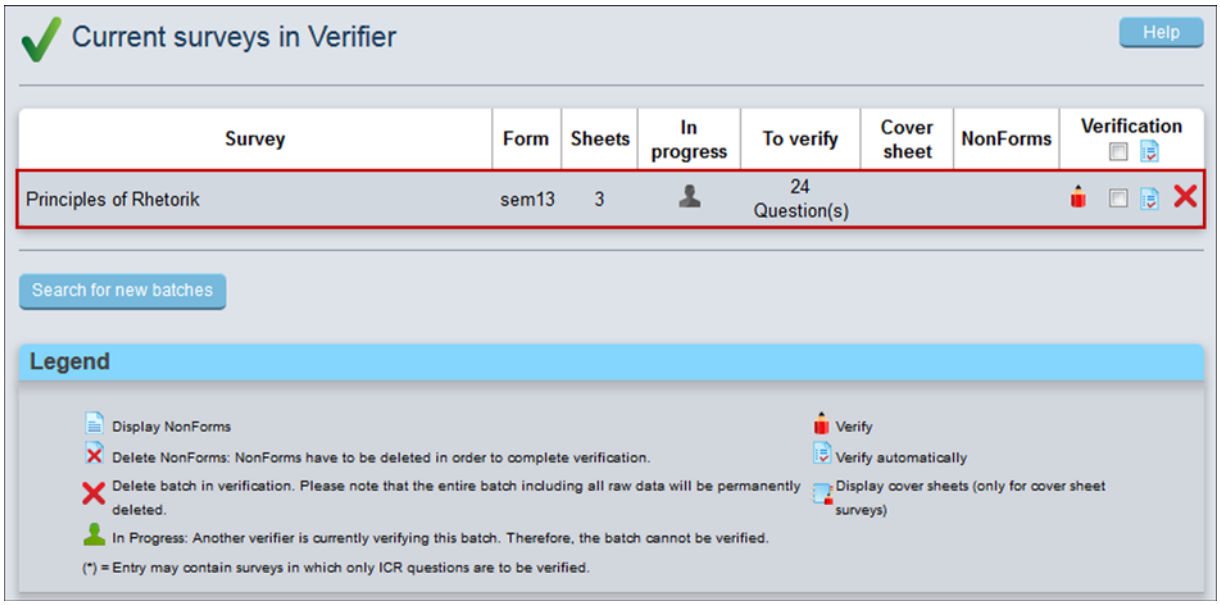
Current surveys in Verifier
Help
Survey
Form
Sheets
In progress
To verify
Cover sheet
NonForms
Verification
Principles of Rhetorik
sem13
3
24 Question(s)
Search for new batches
Legend
Display NonForms
Delete NonForms: NonForms have to be deleted in order to complete verification.
Delete batch in verification. Please note that the entire batch including all raw data will be permanently deleted.
In Progress: Another verifier is currently verifying this batch. Therefore, the batch cannot be verified.
(*) = Entry may contain surveys in which only ICR questions are to be verified.
Verify
Verify automatically
Display cover sheets (only for cover sheet surveys)

Figure 54: Surveys in the Verifier

The pencil icon starts the manual verification process and opens the correction view.

The correction screen always shows one question to be verified. You can comfortably process one question after the other until the verification of all questions in the survey has been completed.

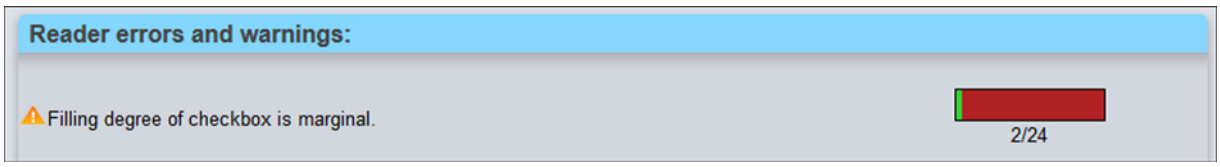

Figure 55: Status (Progress Bar)

The current status is shown in a progress bar in the upper right. The green area denotes questions already verified, the red area those still to be corrected. Additionally, the number of these questions is shown too.

On the left of the status bar, the status reports from the VividForms reader are shown.

The three most common warning messages are:

- The filling degree of a check box is border line.
- No valid check box was found.
- The filling degree of a check box exceeds the allowed value (Check mark discounted).

In the top area, a view of the original scanned question is shown, with the revision view below that. In the revision view you can see the solution suggested by the VividForms Reader.

By clicking on the image, it is enlarged and displayed in a separate window.

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In the next figure you can see a scaled question in which the fill value of the marked box is below the threshold for positively recognized markings. The cross is therefore marked as uncertain and shown in the verification.

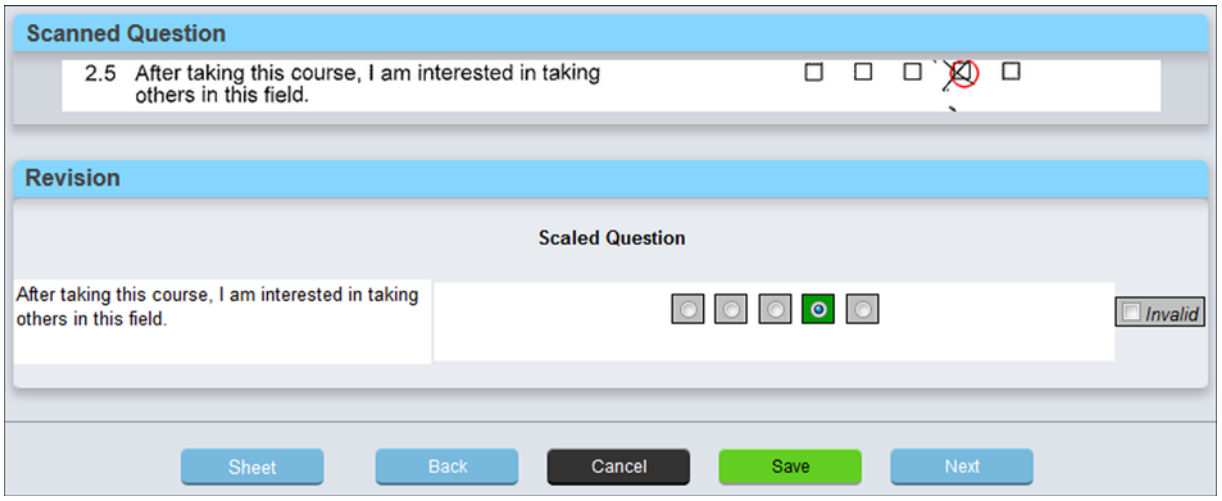

Figure 56: Correcting a Scaled Question

As no clear marking or shading density was detected, the VividForms Verifier suggests rating the answer to this question as invalid.

Now you can correct this suggestion by selecting another box, or marking the answer to this question as “invalid”. By clicking on the **[Next]** button at the bottom of this page, your correction is adopted and you are automatically led to the next question.

By clicking on the **[Back]** button, you can navigate back through the batch being verified, so as to process questions that have already been corrected.

In addition, the following buttons are available:

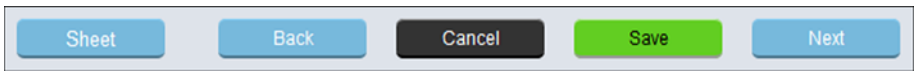

Figure 57: Navigation in the Verifier

[Sheet] – Display the complete sheet in a new window. The question just processed is marked with a red circle. This view can be helpful for the entire context.

[Cancel] – Correction is discontinued. Important: All corrections since the last saving are discarded.

[Save] – The current status of the correction, including the current view is saved. You are then automatically lead back to the screen where you were before changing to verification. Verification can continue immediately or at a later time. Saving the verification is necessary, for example, if work has to be interrupted.

At the closing of verification of a batch, the results are automatically saved and the overview is displayed. However, the verification is only truly ended when all NonForms of a batch are deleted. To do this, use the NonForms view or the button [Delete NonForms].

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If the NonForms are deleted after finishing the manual verification, the verification must be closed by clicking on the [Edit] button.

Now all results of the batch are written to the database and the evaluation can be called up from EvaSys.

Automatic Verification

In order to speed up verification, it is possible to have certain cases automatically verified by the WebVerifier. The prerequisite for this is that the administrator has switched on this option in the settings (“System Settings/Functions/ Automatic verification”).

A column with the icon for Automatic Verification appears. Under the column you can select the batchs, which are to be dealt with by the automatic verification:

Figure 58: Automatic verification

After clicking on the button a selection window opens, by which the settings for the verification can be defined.

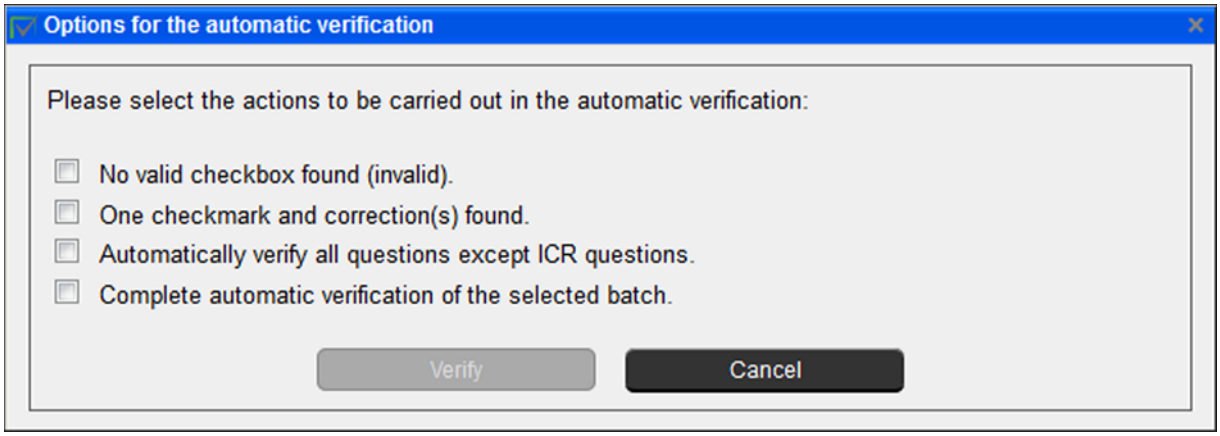
Options for the automatic verification
Please select the actions to be carried out in the automatic verification:
No valid checkbox found (invalid).
One checkmark and correction(s) found.
Automatically verify all questions except ICR questions.
Complete automatic verification of the selected batch.
Verify
Cancel

Figure 59: Selection Fields for Automatic Verification

The following options are available:

- No valid checkbox found (invalid): All cases, in which no valid checkbox is found for a question, are determined invalid.
- One checkmark and correction(s) found: All cases, in which a check-mark and one or more corrections is found are automatically deter-mined valid with the corresponding checkmark.
- Automatically verify all questions except ICR questions: All questions except questions with handwriting recognition will be automatically verified.

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- Complete Automatic Verification of the selected batch: The batch will be completely verified automatically; this means the manual verification will bypassed entirely.

The first two options can, if desired, be combined with each other. By clicking on the button [Perform Verification] the desired process is initiated and the relevant questions are filtered from the total amount of questions to be processed.

6.2.5. Manual Capturing of Handwritten Comments

Answers to open questions, i.e. handwritten texts by participants, are usually displayed as images in the PDF report. If desired, open questions can be captured manually, i.e. typewritten, to ensure anonymity, as no handwriting is recognizable in the PDF report.

The data entry can be activated by the administrator at the subunit level. i.e. for all surveys in a subunit, entries for open questions must initially be typed before the results can be viewed. If the active user's account is in such a subunit, the user can call up the survey's PDF report after scanning, but cannot view the open questions. The survey receives the status “Data entry”.

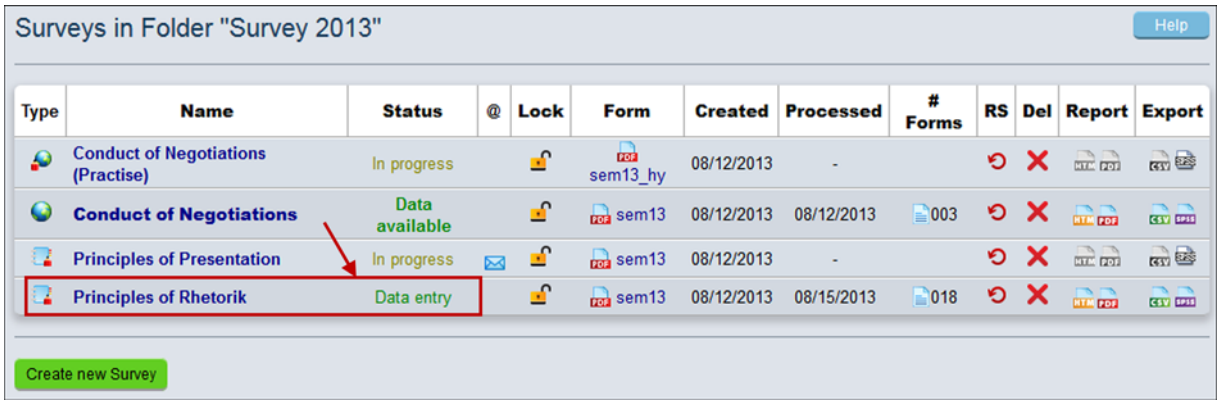

Figure 60: Waiting for Data Entry

The data entry cannot be done by the active user, because a separate user-role, the “Data entry assistant”, is required.

In this case, please contact your EvaSys Administrator so that he can create a suitable user-role for you, or else assign somebody to conduct the data entry.

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6.3. Managing and Conducting Online Surveys

6.3.1. Online Survey Preview

It is possible for you to display a preview of your online survey either in the details of the survey or in the VividForms Editor, as long as the administrator has set your rights to use the Editor.

As shown in the following diagram, click on “Preview online survey” in the details of the survey, area “Actions”:

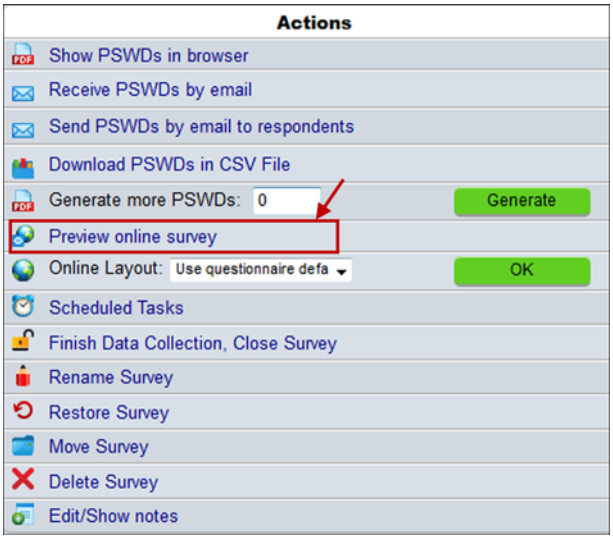

Figure 61: Preview of Online Survey in the Details of a Survey

In this case you will receive the following warning message:

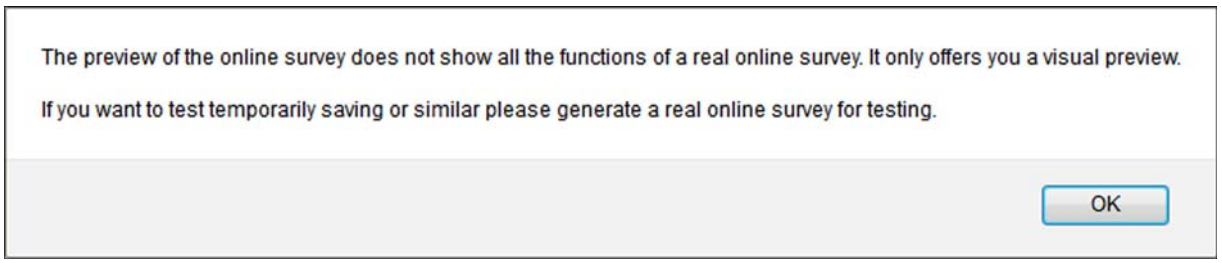
The preview of the online survey does not show all the functions of a real online survey. It only offers you a visual preview.
If you want to test temporarily saving or similar please generate a real online survey for testing.
OK

Figure 62: Warning Message when Calling Up a Preview of an Online Survey

This warning message informs you that the preview of your online survey does not represent a real online survey, but only offers a visualization of such a survey.

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6.3.2. Distributing and Sending PSWDs

The active user has four ways to distribute the PSWDs to the respondents. (PSWDs are password numbers enabling access to the online survey).

- With the option “Show PSWDs in browser”, a PDF document can be opened; this contains a PSWD card on which the PSWD and the URL to the online survey are printed. This card can be cut out and distributed to the participants.
- With the option “Receive PSWDs by email” the PDF document with the PSWD cards can be sent to the email address in the active user's profile.
- With the option “Download PSWDs in CSV File”, a list of PSWD numbers can be accessed in CSV format.
- With the option “Send PSWDs by email to respondents”, the active user can send the PSWDs by batch email directly to the survey participants. To do this, click in the survey details the option “Send PSWDs by email to respondents”.

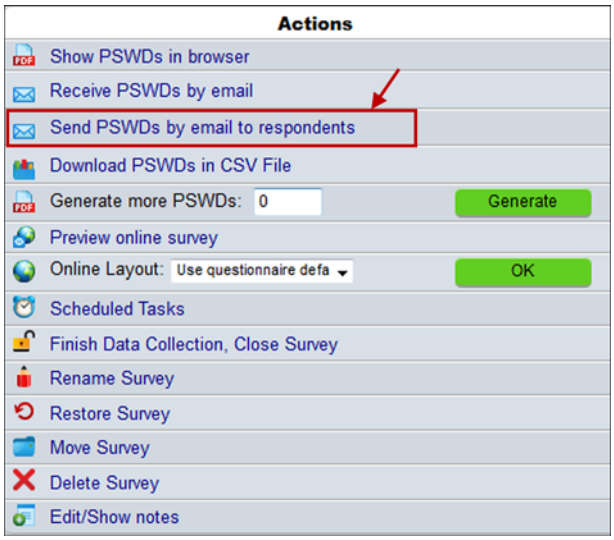

Figure 63: Send PSWDs by Email to Respondents

An input mask appears, into which the participants' email addresses can be entered:

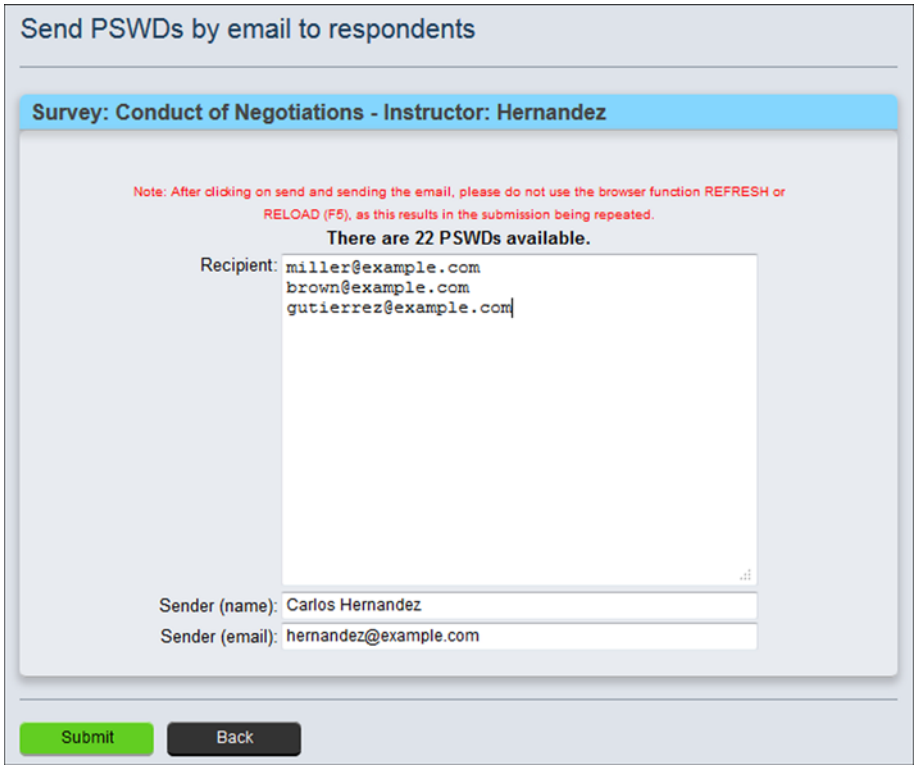
Send PSWDs by email to respondents
Survey: Conduct of Negotiations - Instructor: Hernandez
Note: After clicking on send and sending the email, please do not use the browser function REFRESH or RELOAD (F5), as this results in the submission being repeated.
There are 22 PSWDs available.
Recipient:
miller@example.com
brown@example.com
gutierrez@example.com
Sender (name):
Carlos Hernandez
Sender (email):
hernandez@example.com
Submit
Back

Figure 64: Entering of Participants' Email Addresses

The addresses must be separated from one another by a paragraph. In order to receive a meaningful response rate later, the number of addresses should be identical to the number of PSWDs generated. It is also possible, however, to enter a smaller number of email addresses. If the number of email addresses entered is higher than the number of PSWDs, then no emails will be sent to the addresses listed after the last PSWD.

Hint:
If too few PSWDs are available, at any time you can generate extra PSWDs in the survey details with the menu option "Generate more PSWDs".

When all the addresses have been entered, click [Submit].

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An email text will be displayed, which you can adjust according to your needs.

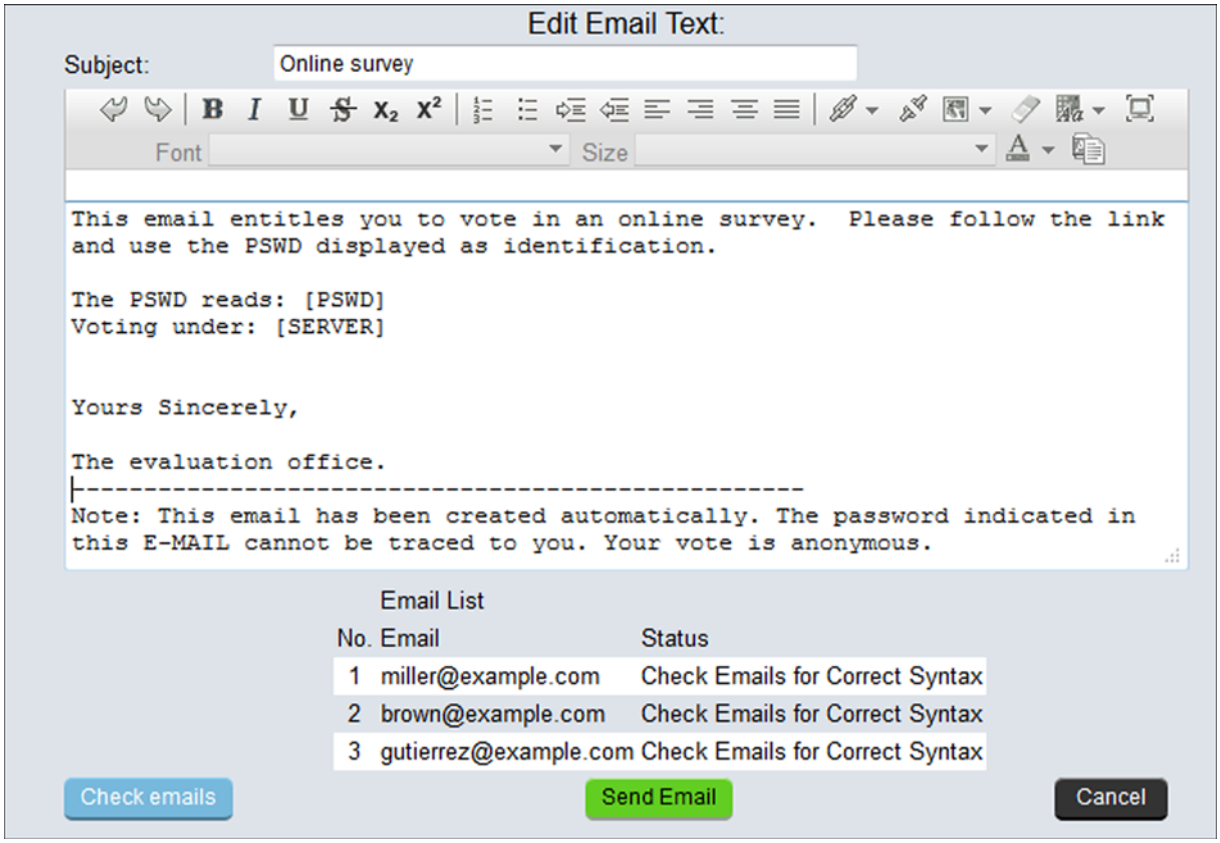
Edit Email Text:
Subject:
Online survey
Font
Size
This email entitles you to vote in an online survey. Please follow the link and use the PSWD displayed as identification.
The PSWD reads: [PSWD]
Voting under: [SERVER]
Yours Sincerely,
The evaluation office.
Note: This email has been created automatically. The password indicated in this E-MAIL cannot be traced to you. Your vote is anonymous.
Email List
No. Email Status
1 miller@example.com Check Emails for Correct Syntax
2 brown@example.com Check Emails for Correct Syntax
3 gutierrez@example.com Check Emails for Correct Syntax
Check emails
Send Email
Cancel

Figure 65: Adjusting the Email Text and Sending of Emails

The email addresses can be checked for correct formatting by clicking the button [Check emails]; the emails are then sent by clicking [Send Email].

6.3.3. Create and Manage Scheduled Online Surveys

EvaSys offers you the ability of conducting time-controlled online surveys.

The following actions can be time-controlled:

- Opening the survey and sending the PSWD by email to participants
- Reminding the participants by email (including PSWD)
- Sending a message to the instructor/trainer or another user in the event that survey returns are below a certain value
- Closing the online survey and, where necessary, the email submission of the evaluation report to instructors/trainers

These actions are managed separately in the so-called “Scheduled Tasks”.

The activation and settings of scheduled tasks is survey dependent. This means that the progress of each online survey can be individually controlled. An overview of all scheduled tasks can be found under the menu “System Settings/Scheduled Tasks”.

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Hint:
By being able to freely select time, email dispatch can be postponed to off-peak times (usually nights). Ensure that the server is operating reliably at the chosen time and not switched off, e.g. because backups are running.

The time control of an online survey can be activated in the details of a survey.

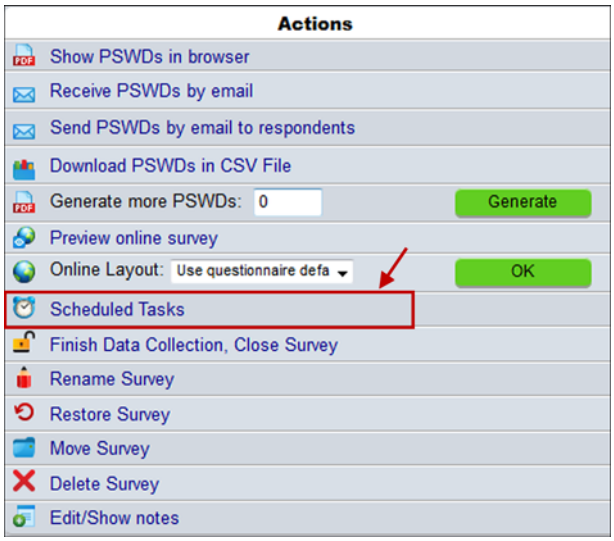

Figure 66: Activating Scheduled Tasks

After generating the survey, the scheduled tasks can be defined one after the other.

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The name and number of the survey can be seen in the header area. Directly underneath the header area the three actions of the online survey can be individually activated and controlled.With a mouse click on the button [Edit], you can reach the desired action.

After generating the survey, all actions are, by default, deactivated. By clicking on [Activate] the action can be activated.

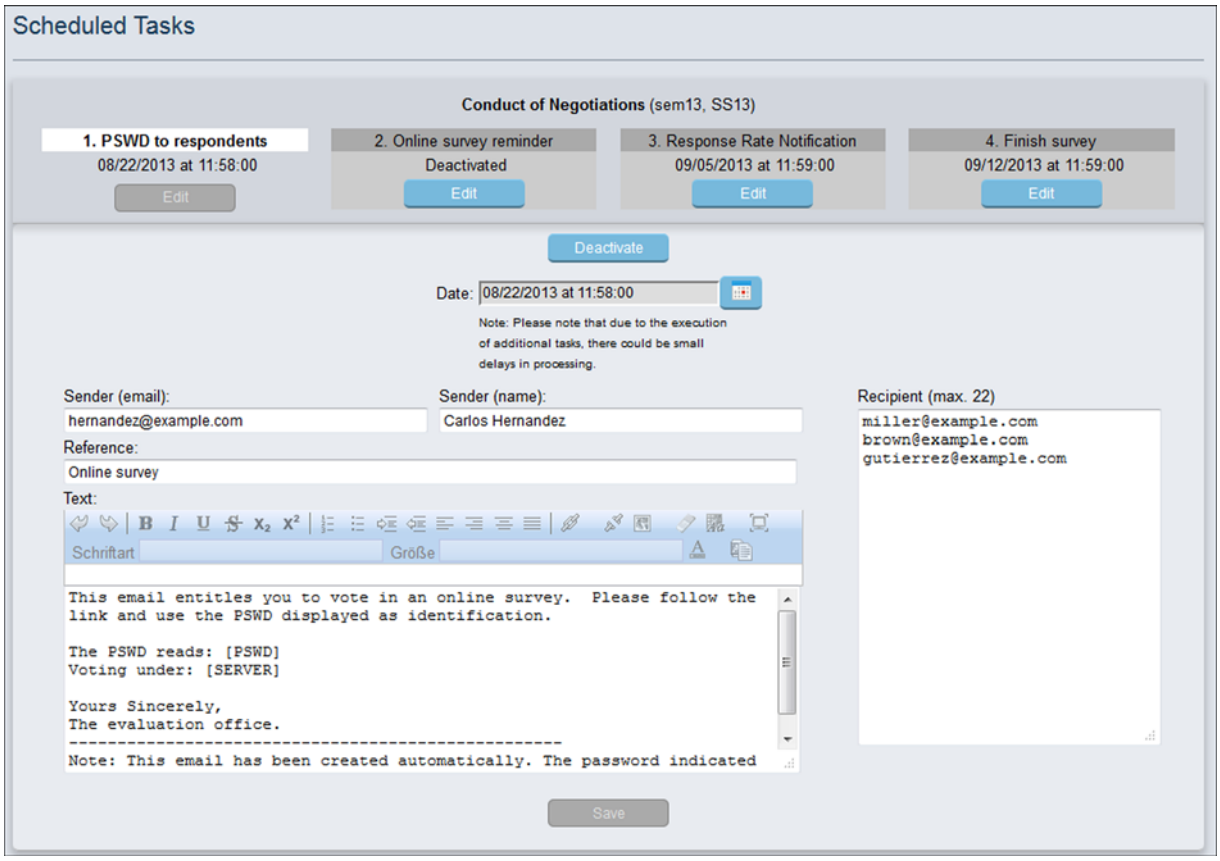

Figure 67: Scheduled Tasks

Task “PSWD to Participants”

The online survey is started with the process “PSWD to Participants”. This means that an email with access information is sent to the participants of the survey.

After clicking on [Activate] the following details can be defined for this email:

- Sender Email
- Sender Name
- Mail Subject
- Mail Text
- Recipients (Email Addresses)

The number of email recipients is limited to the number of PSWDs available. If required, additional PSWDs can be generated at any time in the survey details through “Generate more PSWDs”.

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You can define the timing of the email process in the field “Start Date”. A click on the calendar icon opens the calendar. The date and time when the emails should be sent can be chosen here. The handling of the calendar is described at the end of this chapter.

All settings must be saved by clicking on the [Save] button.

Before saving, the email addresses are checked for their correct syntax (e.g. the @ character). For technical reasons, the actual existence of the email addresses cannot be checked. Undelivered emails can be taken from the EvaSys logbook.The email addresses are saved in the system for the purpose of reminders.

Task “Reminder Online Survey”

Implied under the task “Reminder Online Survey” is the dispatch of a reminder email to all participants who have not yet taken part. Access information can also be resent with the reminder email.

Selectively, more than one reminder email can be sent. In this case, select the option “Multiple reminders every X day(s)”. The system then resends reminder emails until the survey is finally closed.

After activating this task, all the fields of the email such as the senders name, subject and the text of the email can be changed. Recipients are automatically read out of the system. In this way, all participants who have not yet completed the survey automatically receive the email. Once the start date has been determined, the settings of the task have to be saved.

Task “Response Rate Notification”

You can use “Response Rate Notification” to automatically inform one or more people if the response to a survey is below a certain value at a certain time. This allows you to take steps to motivate survey participants. You can use the calendar to select the time and date that this message should be sent, however it must lie between the first process “PSWD to participants” and the fourth process “End Survey”.

The value, in percent, of the response rate which participation must be under in order for a message to be sent, can be set in “Notification at a response rate below”. Enter the relevant percentage value into the entry field.

The response rate is determined using the calculation method set in EvaSys Settings (Menu “System Settings/EvaSys Settings/Survey/Method of calculating the response rate”). You can choose a method other than the standard method using the drop-down menu.

Course Instructors, the Dean/Subunit Administrator for the subunit in question, and/or any other user in the system with an Instructor/Trainer, Dean/Subunit Manager, Administrator, or Subunit Administrator account can receive the message. Choose the desired recipient from the drop-down list and click [Add]. You can list more than one recipient if necessary.

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Use [Save] to save the settings, and [Apply to All] to apply the settings to all other scheduled tasks currently being edited.

You can adapt the text for the email in advance by using the global text templates (Menu "System Settings/Text Templates") or in the text templates for the relevant questionnaire ("E-MAIL: Notification at low response rate").

Task “Close Survey”

This task serves to close the online survey.

Once the survey is closed, no further responses can be accepted. The unused PSWDs become invalid and can no longer be used. Informing the participants is not included in this task.

If required, the direct submission of the evaluation document to the survey owner can be activated. In this case, the owner of the survey (i.e. the active user) automatically receives an email with the results of the online survey.

This task, too, is time phased with a start date and secured with [Save].

Using the Calendar

The calendar serves to select the date and time of a scheduled task.

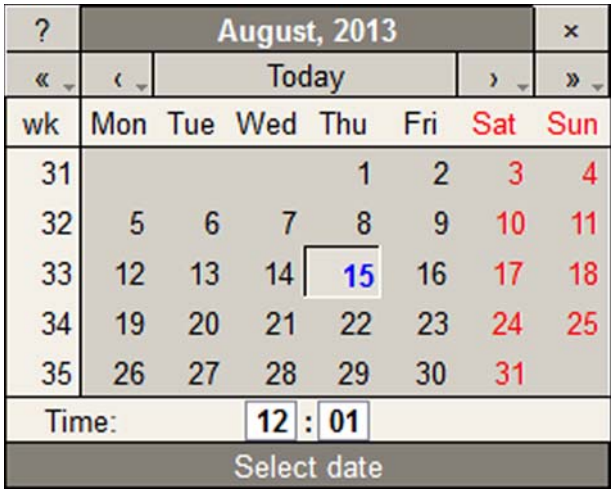

Figure 68: Calendar

All changes to the calendar are automatically adopted in the input template behind it. For this reason there is no save button in the calendar itself, once the date and time have been selected, it can be closed with the “x”.

With a click on [?], help for using the calendar can be displayed.

By means of the arrows you can change to the required year and required month. Hold mouse button on any of the above buttons for faster selection. You subsequently select a day in the calendar and, in the line below that, a time.

Hint:
With each mouse click, the time is increased by 1 hour/minute. By pressing shift and a mouse click, the hours and minutes are reduced by 1. Furthermore you can click and drag for faster selection.

6.3.4. Overview of planned Online Surveys

In the “Subunit” menu, under “Scheduled Tasks”, you can view and manage all the scheduled tasks for online surveys.

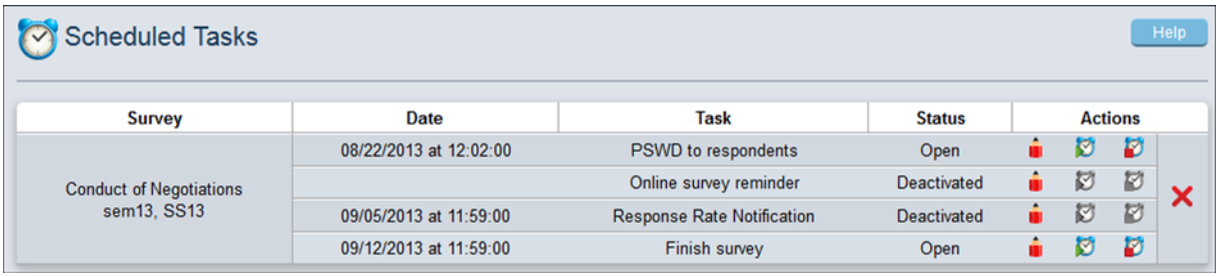

Figure 69: List of Scheduled Tasks

For each survey, the three tasks are shown in one line. The status of the task can be seen in the column “Status”.

The following statuses are possible:

- Open – The task is activated and not yet carried out
- Running – The task is now running, emails are being sent.
- Deactivated – The task is deactivated
- Executed – The task has been successfully completed
- Executed with error – The task was completed with error
- Executed with warning – The task was completed but with a warning (e.g. “report could not be created as data was not available”)
- Not completed/with error– The task is not correctly defined and the settings should be checked

With these "Actions" symbols you can manage the scheduled tasks. An explanatory text is displayed if the mouse is moved onto a symbol.

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7. Working with the Data of the Active User

This function is available as soon as the first data is ready, i.e. as soon as the questionnaires have been scanned and evaluated by the Reader, or, as soon as the online survey participants have voted. The survey data can be accessed in two places: in the survey overview and in the details of a survey.

7.1. In the overview of Surveys in a Folder

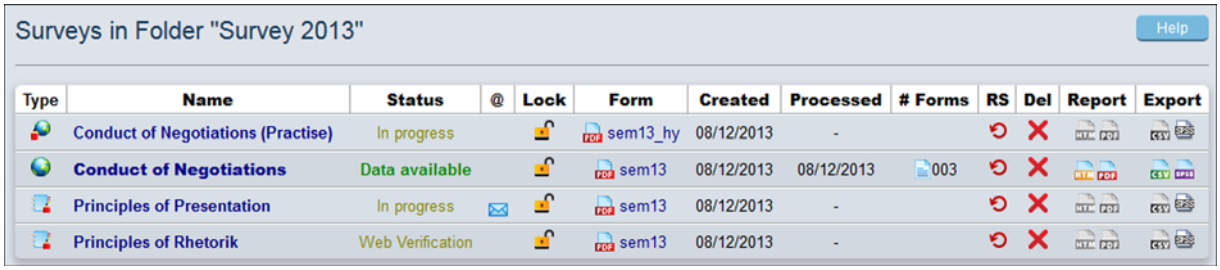

Figure 70: Survey with Data

The survey overview enables rapid access to each survey's data. The following columns are important:

- **# Forms** – Number of captured questionnaires
- **RS** – Delete data. If you wish to test a questionnaire in a survey, you can delete the data before starting the survey again.
- **Del** – Deletes the survey and the data, the questionnaire, however, remains preserved.
- **Report** – as soon as data from participants are included in the survey, a report is displayed. To view the report, click on the appropriate survey. The report is generated from the current datasets each time you click and can be displayed as a PDF or HTML page.

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7.2. In the Details of a Survey

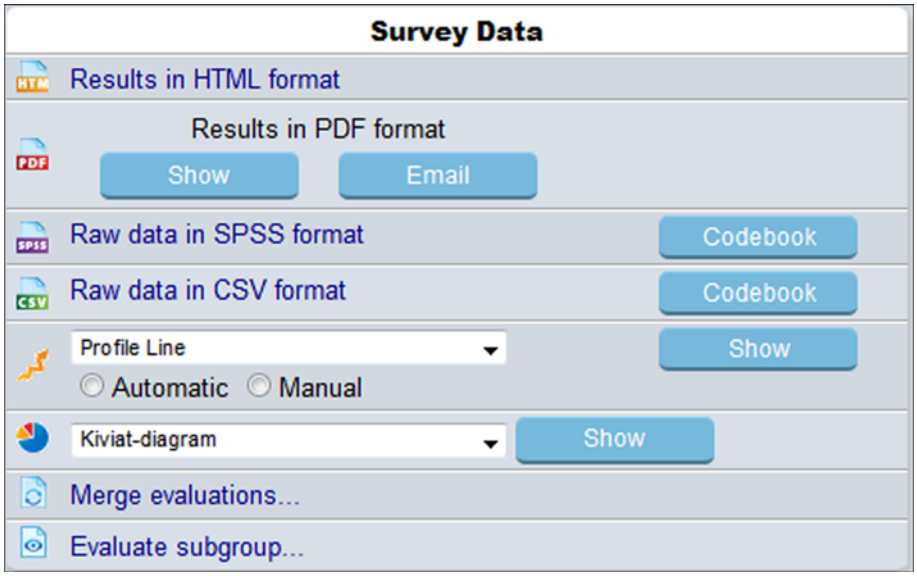

Figure 71: Details of a Survey with Data

Note:

The analysis options Profile line and Kiviat chart as well as the functions to merge reports and create subgroup reports are only available after having opened the PDF report once.

You gain access the survey's details by clicking on a survey's name in the survey overview. Different data access is available in the section “Survey data”. The individual options will be explained in the following chapters.

7.2.1. Survey Evaluation Statistics (only in paper surveys)

In the evaluation statistics the header data of all scanned batches of a survey are displayed. From this data, the timing and extent of the scanning process can be traced.

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7.2.2. Results in HTML Format

The (interim) results of your survey are available as an HTML version. Click the text to open a new browser window with the evaluation.

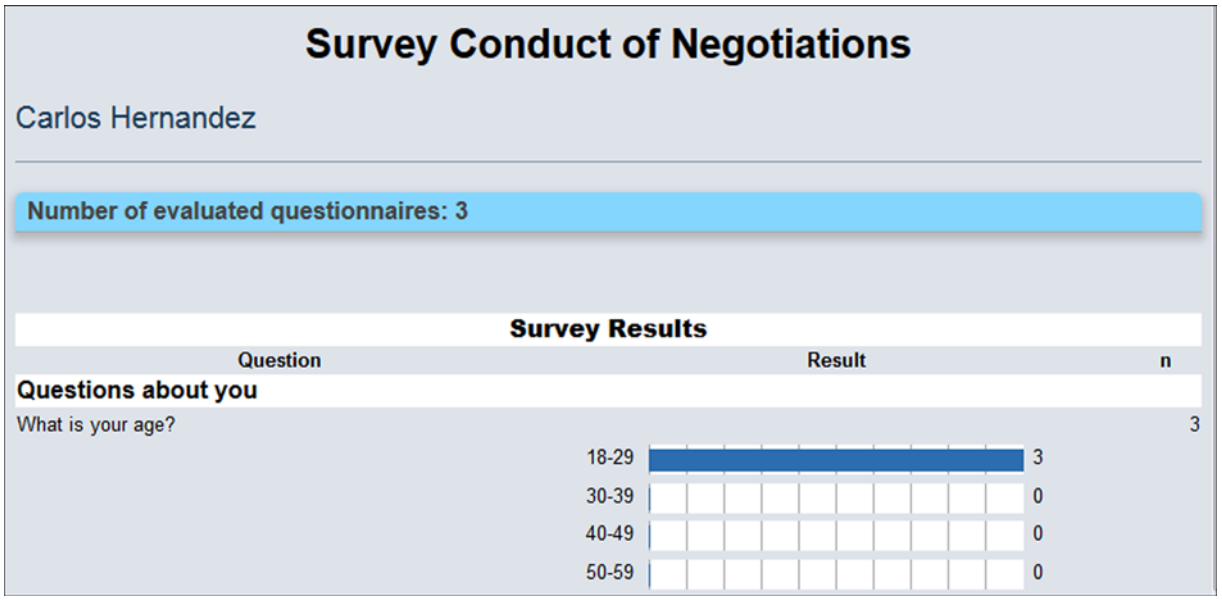

Figure 72: HTML Report

On the evaluation page you are able to click on the result bar. A small window then opens, in which the histogram belonging to a question is displayed graphically. The hand written image areas are also clickable. You can then view the corresponding image in its original size, which is, if in doubt, easier to read.

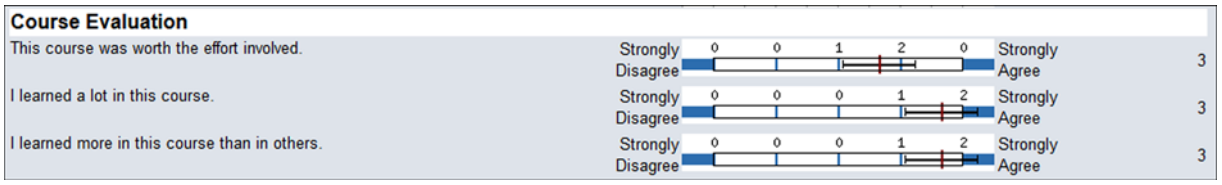

Figure 73: : Scaled Questions in the HTML Report

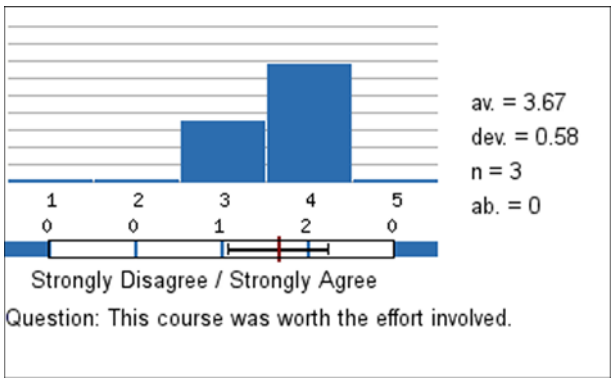

Figure 74: Scaled Questions in the HTML Report - histogram

The result bar shows the percentage distribution of answers to the checkboxes. On the right hand side of the line, the number of each of the captured responses is displayed. This number can vary downwardsfrom the number of captured questionnaires, as abstentions or invalid crosses (e.g. by multiple markings) arenot counted.

The red vertical bar represents the mean. The horizontal, H-shaped marking behind the average value is the value range for standard deviation. The histograms belonging to the respective result barshow the percentage distribution graphically, additionally, the mean and the standard deviation are presented numerically.

7.2.3. Results in PDF Format

Here the PDF version of the evaluation is at your disposal. The high level of detail and the ability to store for future use are some of the advantages of the PDF report. By clicking on the button [Show], a PDF file opens in a separate browser window.

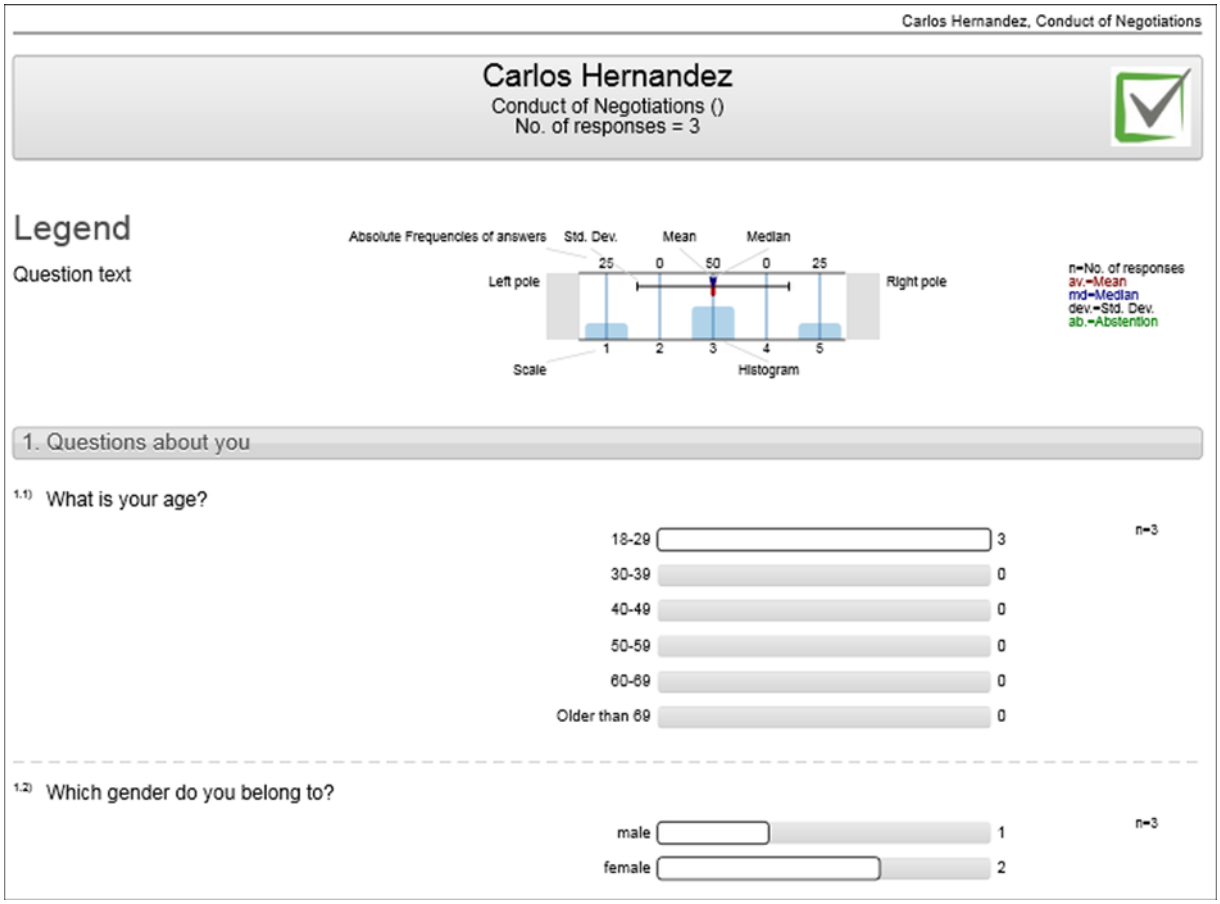

Figure 75: PDF Report

- The PDF report can - depending on the settings of the administrator - include the following elements:
- A cover letter to the instructor / trainer / project manager
- Histograms of the indicators in the questionnaires, and, if required, with global indicators and/or Cronbach's Alpha
- A legend for the evaluation of scaled questions

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- The individual evaluation of the questions appearing on the questionnaire (depending on settings, with or without open questions)
- Large scale histograms of the scaled questions
- Cross tabulations
- A profile line (which– if a standard is set– is presented as a normed profile line)
- A presentation template, which includes the indicators
- Answers to open questions (handwritten or typed – the latter in the case of online surveys or where a data capturing assistant was used)
- Survey notes (You can display the added notes of the different user types in the PDF report).

The elements of the PDF report will depend on the system-wide settings and the properties of the questionnaire.

Via the button [Email] the PDF report can be sent directly to the active user. The EvaSys server sends an email to the address stored in your profile. This email contains the PDF analysis, and (if enabled), and has the CSV file attached. Since producing the files takes a few seconds, you should exercise a little patience until the relevant message appears. Clicking again causes the generation of further emails.

7.2.4. Profile Line (optional)

This function creates a profile line representation of the scaled questions of the relevant survey. The other question types will not appear here. Select [Profile Line] from the list, then click on [Show].

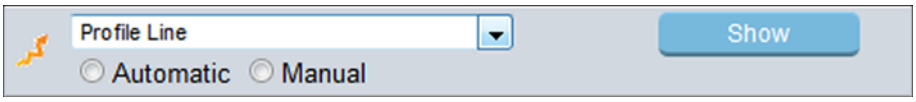

Figure 76: Profile Line from the Details of a Survey

Note:
Open the PDF report first, otherwise the option “Profile Line” is not shown.

To compare this profile line with one from another survey (with requested report) or another report, choose from the selection list (drop-down menu) one of the comparison surveys. Only evaluated surveys appear in this list. Click on [Show]; the profile line comparison is opened.

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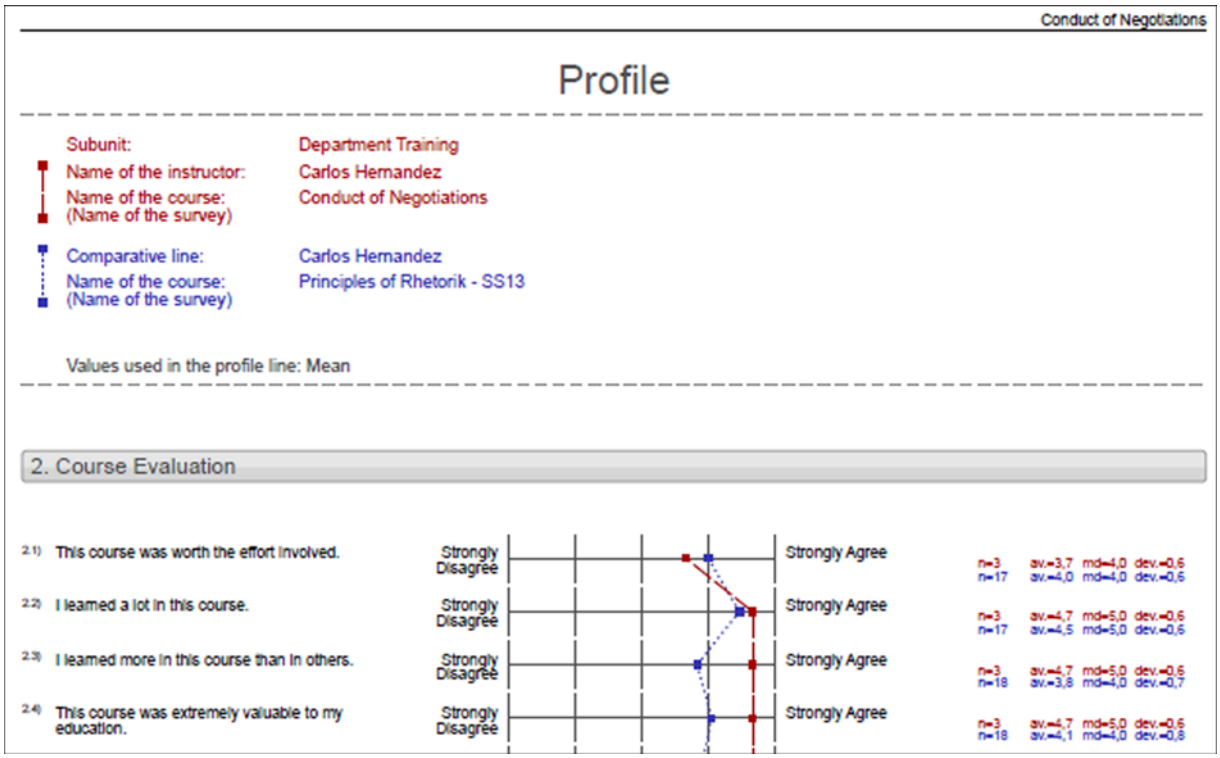
Conduct of Negotiations
Profile
Subunit: Department Training
Name of the instructor: Carlos Hernandez
Name of the course: (Name of the survey) Conduct of Negotiations
Comparative line: Carlos Hernandez
Name of the course: (Name of the survey) Principles of Rhetorik - SS13
Values used in the profile line: Mean
2. Course Evaluation
2.1) This course was worth the effort involved.
2.2) I learned a lot in this course.
2.3) I learned more in this course than in others.
2.4) This course was extremely valuable to my education.
Strongly Disagree
Strongly Agree

Figure 77: Profile Line Comparison

If you have used different questionnaires for your surveys, but would like to compare them anyway, an automatic or manual text comparison is available. Activate the option “Automatic” if the questionnaires hardly differ. EvaSys then matches the character strings of the question texts on each form.

Activate the option “Manual” if your questionnaires have greater differences, i.e. when the character strings are too different (because you may want to compare a German and an English form), or if the order of the questions on the form is different. The individual questions on both forms must now be manually compared and collated.

7.2.5. Kiviat Diagram (optional)

This function creates a Kiviat diagram (also known as a spider or radar chart) for the survey. It does not evaluate individual questions, but forms an un-weighted average over all questions of a question category (e.g. teaching, organization,...). Each question category then represents an axis of the web presentation. An average on the positive end of the scale corresponds to a value of 100% on each axis, while a mean value at the negative end of the scale 0% – the web center – is represented. This view only works correctly when there are only questions within a question category of the same scaling. Additionally, the questionnaire must be developed for such a representation, so as to produce valid results.

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7.2.6. Merging Evaluations...

As soon as you have more than one survey in the system, this function is available. You can merge surveys using same questionnaire as well as surveys with partially similar questionnaires. Automatic and manual question mapping are available for comparing different questionnaires.

Note:
Open the PDF report first, otherwise the option “Merge evaluations…” is not shown.

After clicking on [Merge Evaluations...] a selection list of surveys ready to be merged appears.

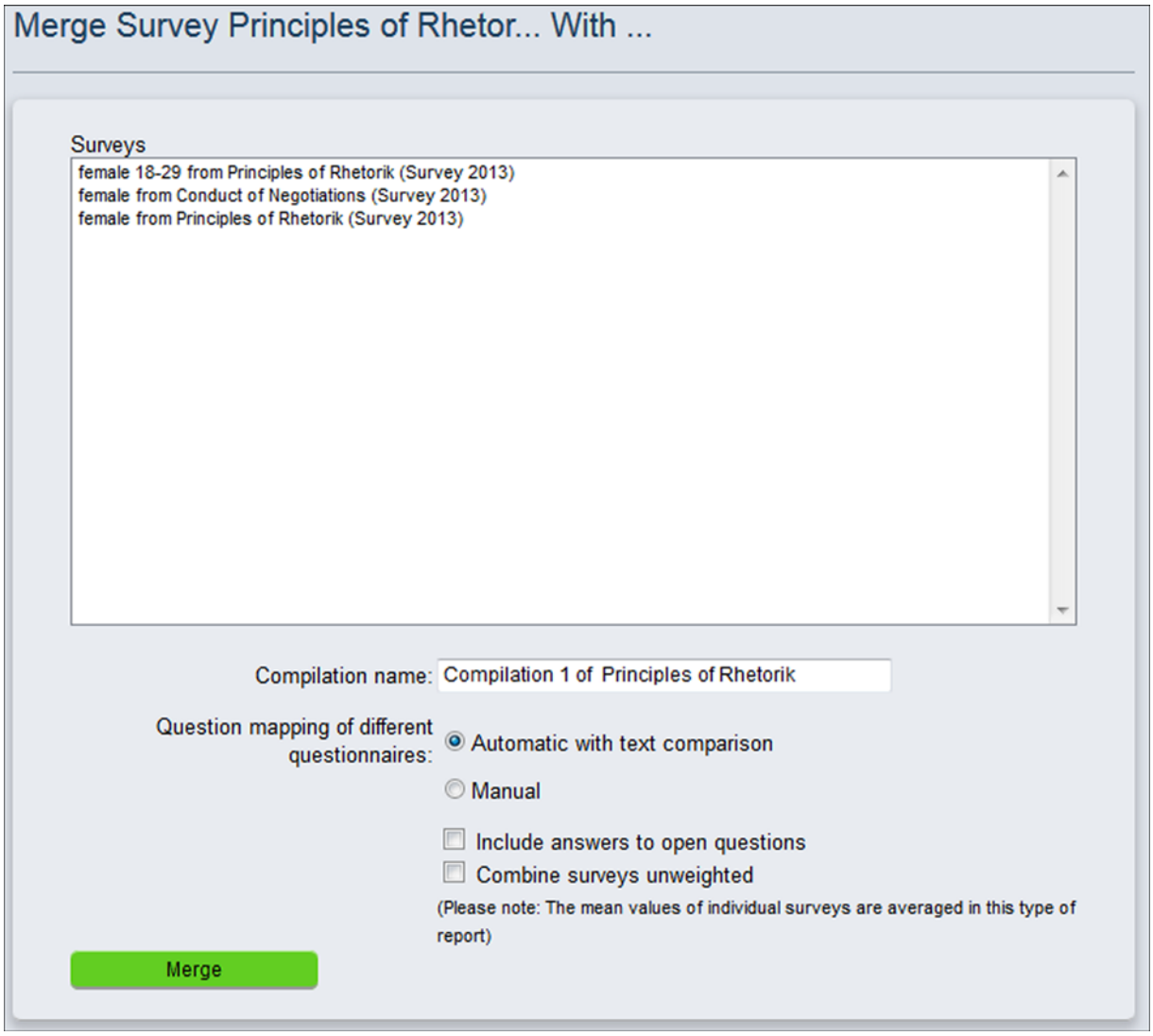
Merge Survey Principles of Rhetor... With ...
Surveys
female 18-29 from Principles of Rhetorik (Survey 2013)
female from Conduct of Negotiations (Survey 2013)
female from Principles of Rhetorik (Survey 2013)
Compilation name:
Compilation 1 of Principles of Rhetorik
Question mapping of different questionnaires:
Automatic with text comparison
Manual
Include answers to open questions
Combine surveys unweighted
(Please note: The mean values of individual surveys are averaged in this type of report)
Merge

Figure 78: Merge Surveys

These are presented in a “Survey Name (Folder name)” manner. By holding “ctrl” and using the mouse, you can make multiple selections from the list. Enter a name for the resulting compilation.

Select whether you want to include open questions in the report and whether question mapping in differing questionnaires should be conducted manually or automatically. The last option allows you to determine whether the surveys are merged weighted or unweighted. Unweighted compilations do not include open questions. (Unweighted reports are not available for export.)

Finally, click on [Merge].

In the next window you can deselect individual questions which are not to be included in the report. By default, all questions are activated. In surveys of various questionnaires, only questions of the same textual content are automatically activated.

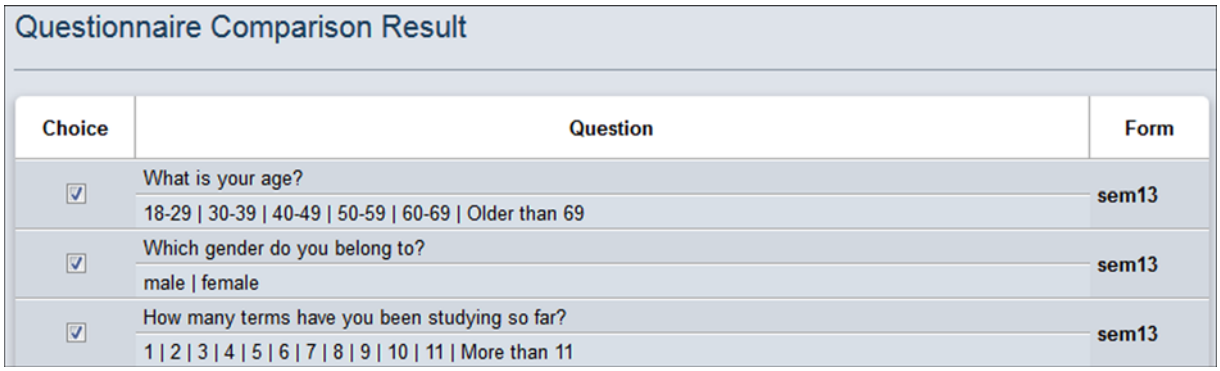
Questionnaire Comparison Result
Choice
Question
Form
What is your age?
18-29 | 30-39 | 40-49 | 50-59 | 60-69 | Older than 69
sem13
Which gender do you belong to?
male | female
sem13
How many terms have you been studying so far?
1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | More than 11
sem13

Figure 79: Questionnaire Comparison

By clicking on [Request], the compilation is generated.

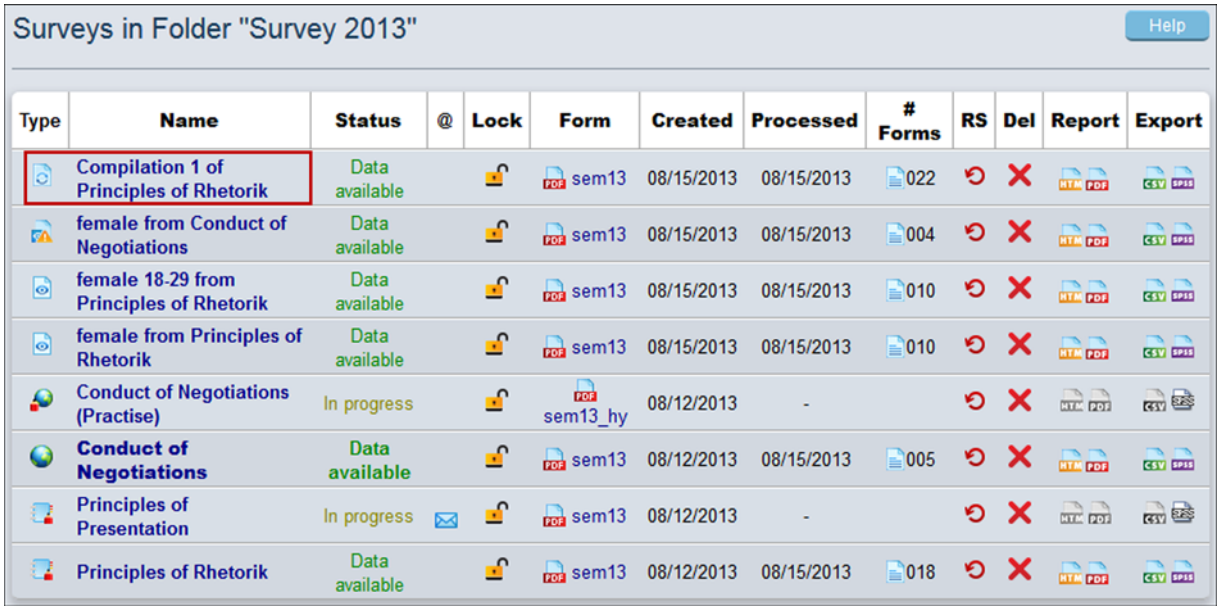

Figure 80: Merged Survey in the Folder View

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7.2.7. Evaluate Subgroup

If data is available from the survey of an active user, the active user can create subgroup reports of the surveys. This means that separate reports can be created for each of the options of single choice, multiple choice or scaled questions, for example a report for male and a report for female students.

Note:
Open the PDF report first, otherwise the option “Evaluate subgroup…” is not shown.

After clicking on [Evaluate subgroup...], a list of all the closed questions in the questionnaire appears.

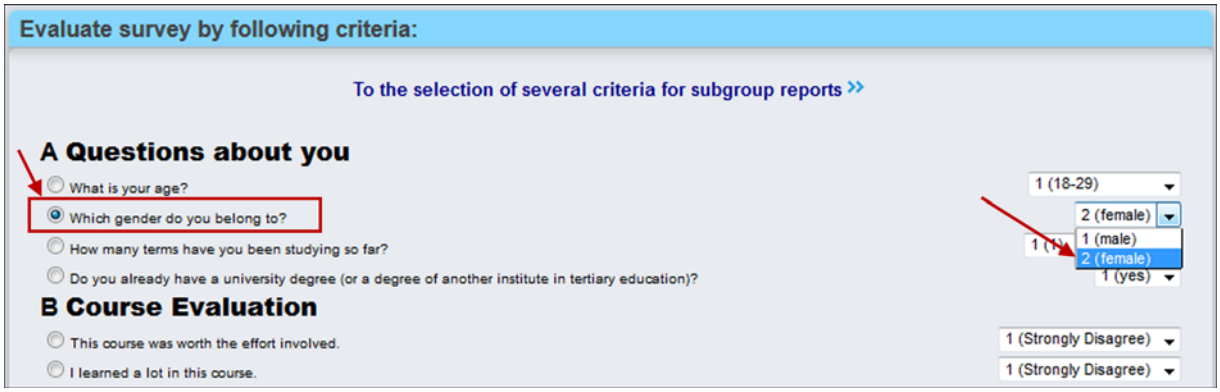
Evaluate survey by following criteria:
To the selection of several criteria for subgroup reports
A Questions about you
What is your age?
Which gender do you belong to?
How many terms have you been studying so far?
Do you already have a university degree (or a degree of another institute in tertiary education)?
B Course Evaluation
This course was worth the effort involved.
I learned a lot in this course.
1 (18-29)
2 (female)
1 (male)
2 (female)
1 (yes)
1 (Strongly Disagree)
1 (Strongly Disagree)

Figure 81: Subgroup Evaluation i.e. All female Participants

On the left side, select one of the questions from the relevant selection box. Then, on the right side, open the corresponding list and select one of the answer options. The list contains the valid responses to the question. Then, at the bottom of this screen, enter a name for the resulting survey and click on [Create]. The subgroup report will now be displayed in the list of surveys.

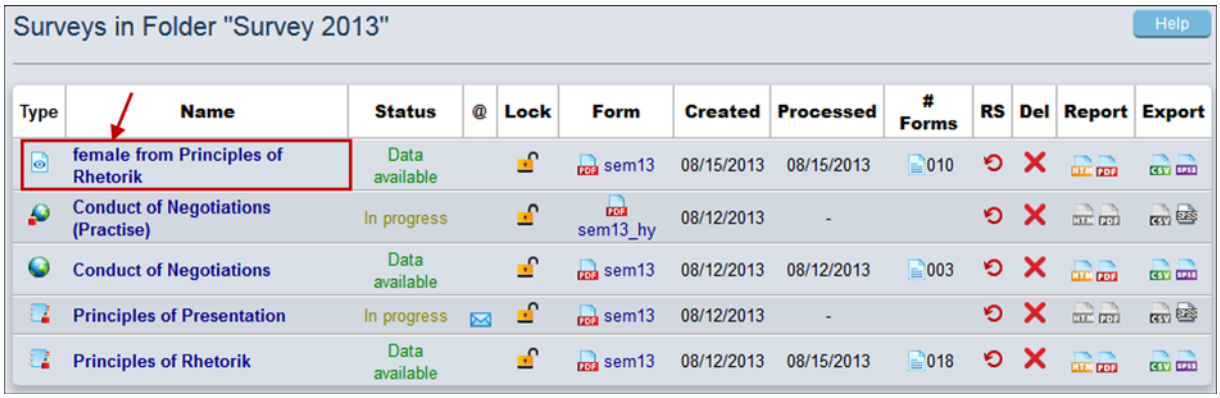

Figure 82: Subgroup Evaluation in the List of Surveys

To create a subgroup report with several criteria, click on “Evaluate subgroup…” in the details of a report.

In the window that opens, you can click on the link “To the selection of several criteria for subgroup reports”.

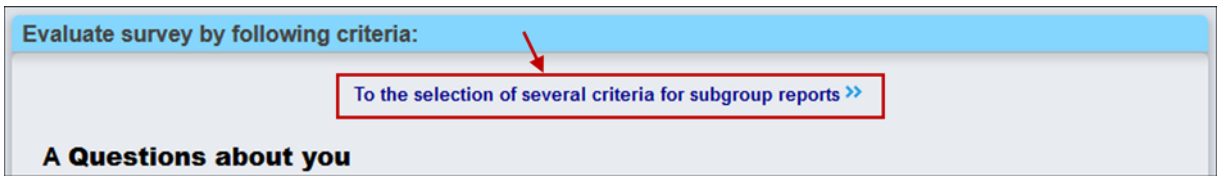
Evaluate survey by following criteria:
To the selection of several criteria for subgroup reports »
A Questions about you

Figure 83: Selecting Multiple Criteria for Subgroup Reports

In the following dialog box, select the desired criteria for your subgroup report.

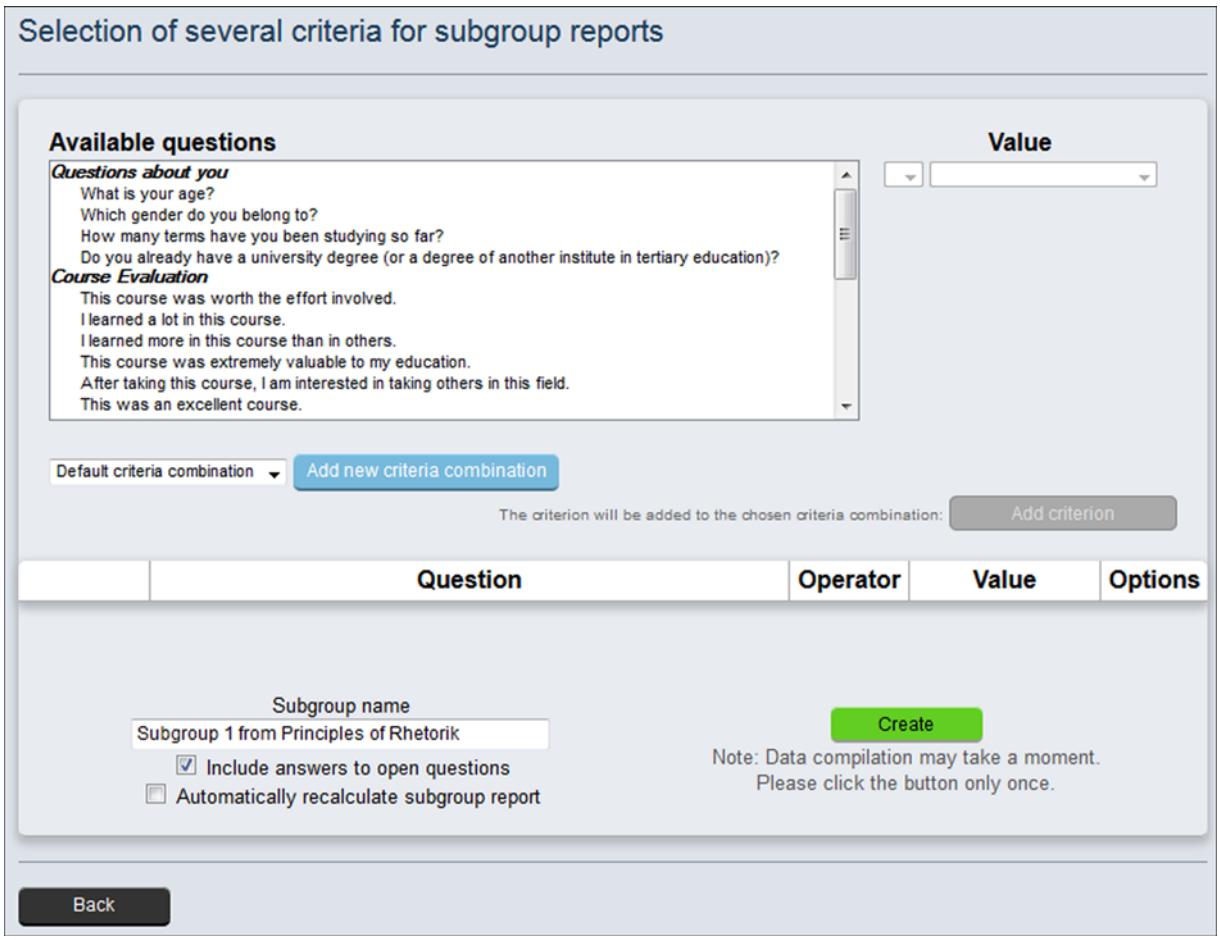
Selection of several criteria for subgroup reports
Available questions
Value
Questions about you
What is your age?
Which gender do you belong to?
How many terms have you been studying so far?
Do you already have a university degree (or a degree of another institute in tertiary education)?
Course Evaluation
This course was worth the effort involved.
I learned a lot in this course.
I learned more in this course than in others.
This course was extremely valuable to my education.
After taking this course, I am interested in taking others in this field.
This was an excellent course.
Default criteria combination
Add new criteria combination
The criterion will be added to the chosen criteria combination:
Add criterion
Question
Operator
Value
Options
Subgroup name
Subgroup 1 from Principles of Rhetorik
Include answers to open questions
Automatically recalculate subgroup report
Create
Note: Data compilation may take a moment.
Please click the button only once.
Back

Figure 84: Selecting the Criteria (Questions) for the Subgroup Report

In this window you can, for example, choose all female participants as your first criterion. To do this, click on the question “Which gender do...” in the area “Available questions”. On the right hand side select then the value of the criterion, that is, the desired response to this question.

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In this example, you would select “female”:

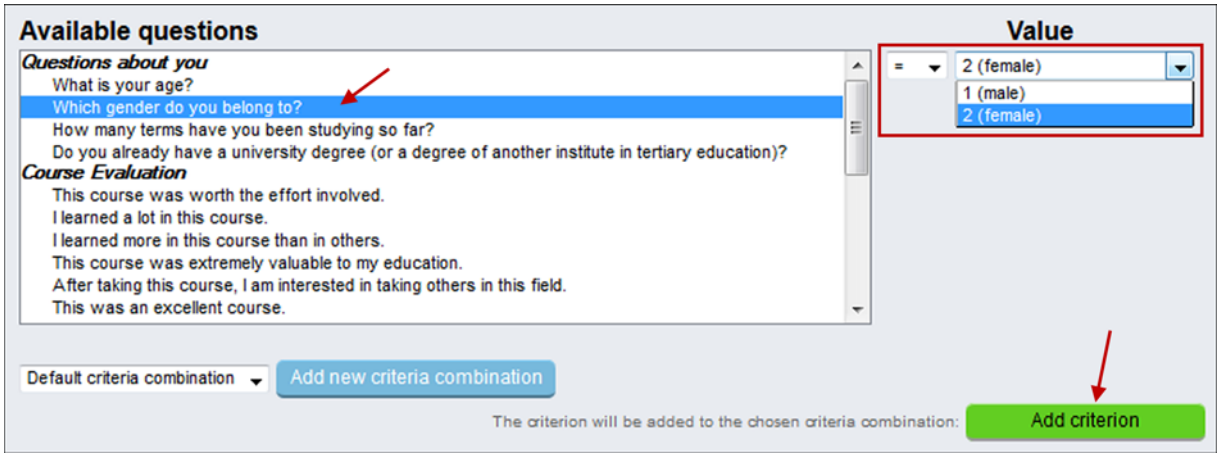
Available questions
Value
Questions about you
What is your age?
Which gender do you belong to?
How many terms have you been studying so far?
Do you already have a university degree (or a degree of another institute in tertiary education)?
Course Evaluation
This course was worth the effort involved.
I learned a lot in this course.
I learned more in this course than in others.
This course was extremely valuable to my education.
After taking this course, I am interested in taking others in this field.
This was an excellent course.
= 2 (female)
1 (male)
2 (female)
Default criteria combination
Add new criteria combination
The criterion will be added to the chosen criteria combination:
Add criterion

Figure 85: Selecting the First Criteria “female” for the Subgroup Report

Finally, click on the button [Add criterion]. The criterion will then appear in your “Default criteria combination”. In this example, the criterion“Gender” with the value “2 (female)” was added. The condition is that this value must be met exactly (indicated by the “=” sign in the column “operator”):

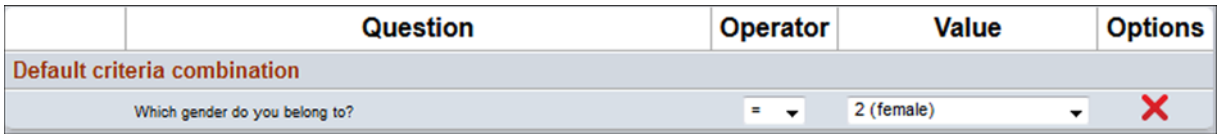

Figure 86: Criteria “female” Was Successfully Selected

Depending on what questiontype the selected question belongs to, you can select a “=” in the column “Operator”, or select other operators too. In scaled and matrix questions, as well as the “=” there is “<”, “>” and “≤” and “≥”.

You can change the value of the criterion here at any time, select, for example, all male participants instead of all female participants. Simply click on the arrow of the drop-down menu for the value of your selected question:

Figure 87: Changing the Value from “female” to “male”

Furthermore, you can delete the selected criterion at any time by clicking on the red cross in the column “Options”.

You can also create a subgroup report for all female respondents with a simple subgroup, there is no need to combine criteria. You can, however, combine this criterion with others, for example with the major subject. In this way you can create a subgroup report on all female participants who have entered chemistry as their main subject.

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As described above, first select the criteria “Gender” with the value “female”. In a second step, select the criteria “Age” with the value “1 /(18-29)”. Your default criteria combination now consists of two criteria:

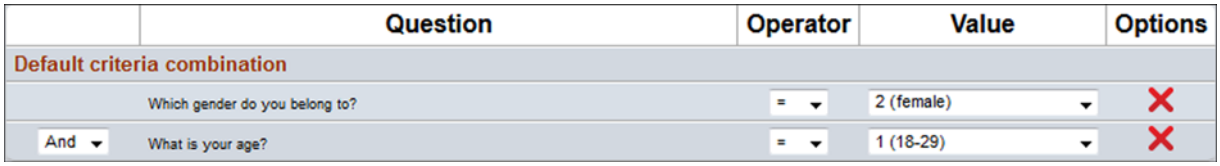

Figure 88: Criteria Combination

By linking the questions with the operator "And" both conditions have to apply if the survey results are supposed to be included into the subgroup report.

If you create a subgroup report which contains the results of the participants who are either male or study physics as main subject, please select the operator "Or".

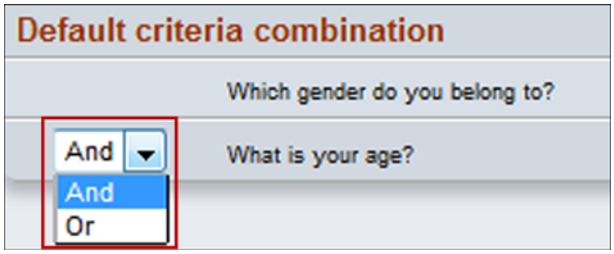

Figure 89: Operator of Two Criteria

Subsequently, as you are familiar with, assign a meaningful name, opt for or against the inclusion of the open questions in the subgroup report and click on the button [Create]. The subgroup report now appears in the list of reports:

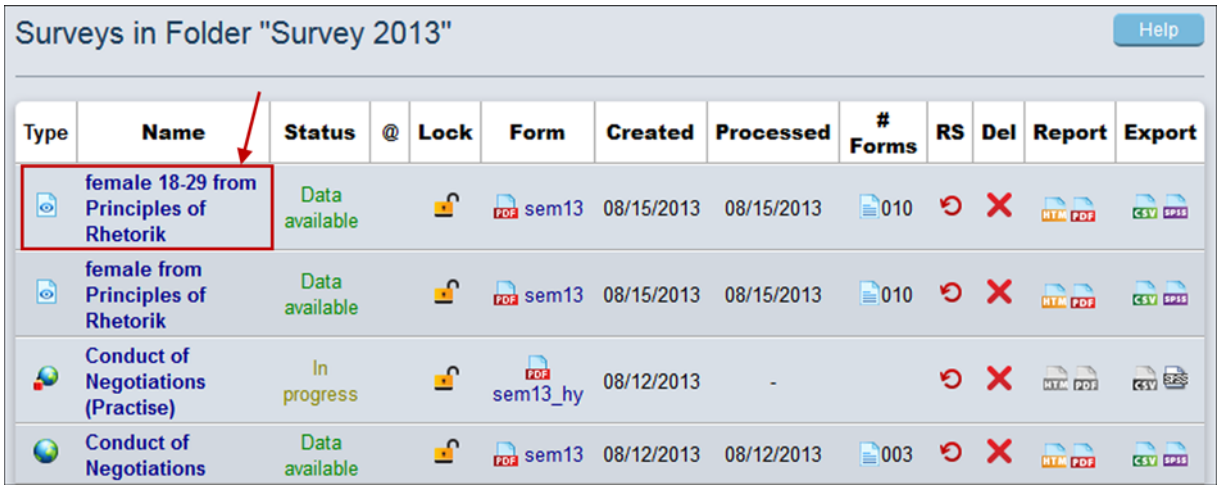

Figure 90: Subgroup Reports Already Created

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7.2.8. Dynamic Subgroups

The survey need not be closed when the subgroup reports are created, this means, that data may be still be added. For this case, the subgroup reports of an active instructor/trainer – as opposed to those of the report creator – will be updated automatically. An active instructor/trainer can decide whether he/she wants to create a dynamic subgroup or not. Dynamic subgroup reports are automatically updated when new data comes in. This avoids having to repeat the creation of subgroups. This functionality is especially useful when running longer-term surveys and you want to observe criteria filtered reports over the course of the survey. (You can always save the reports as PDFs and, as such, keep them available after re-calculation takes place.)

Dynamic subgroup reports are only available through instructor/trainer accounts, i.e. report creators cannot use this function.

Open the details of a survey and click in the area Survey Data on “Evaluate subgroup…”. You can determine the automatic recalculation at a later date by means of the checkbox “Automatically recalculate subgroup report” under the name of the subgroup.

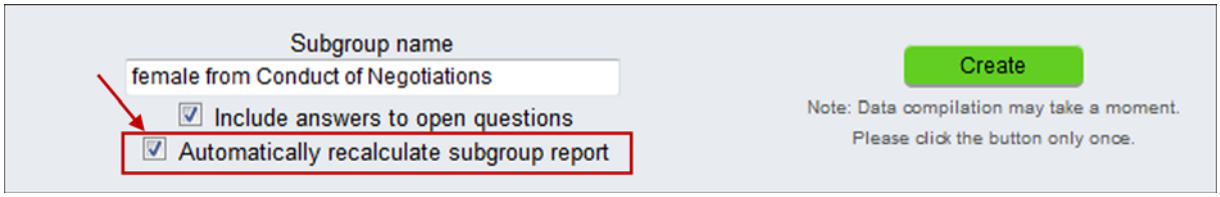
Subgroup name
female from Conduct of Negotiations
Include answers to open questions
Automatically recalculate subgroup report
Create
Note: Data compilation may take a moment.
Please click the button only once.

Figure 91: Creating a Dynamic Subgroup

Note:
Should this option not appear, please recall the HTML or PDF report and then click on [Reload].

Dynamic subgroups are marked by a subgroup symbol with a warning triangle:

Compilation 1 of Principles of Rhetorik Data available sem13 08/15/2013 08/15/2013 022
female from Conduct of Negotiations Data available sem13 08/15/2013 08/15/2013 004
female from Principles of Rhetorik Data available sem13 08/15/2013 08/15/2013 010
Conduct of Negotiations (Practise) In progress sem13_hy 08/12/2013 -
Conduct of Negotiations Data available sem13 08/12/2013 08/15/2013 005
Principles of Presentation In progress sem13 08/12/2013 -
Principles of Rhetorik Web Verification sem13 08/12/2013 -

Figure 92: Dynamic Subgroups in the List of Surveys

If new data has been captured for the main survey (in the example shown “Conduct of Negotiation”), the next time the folder is opened, an automatic re-calculation of the subgroups takes place:

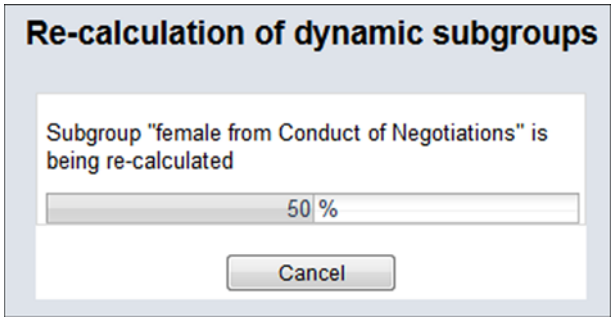

Figure 93: Recalculation of Subgroups

Once the recalculation has been completed, the recalculated evaluation is immediately available:

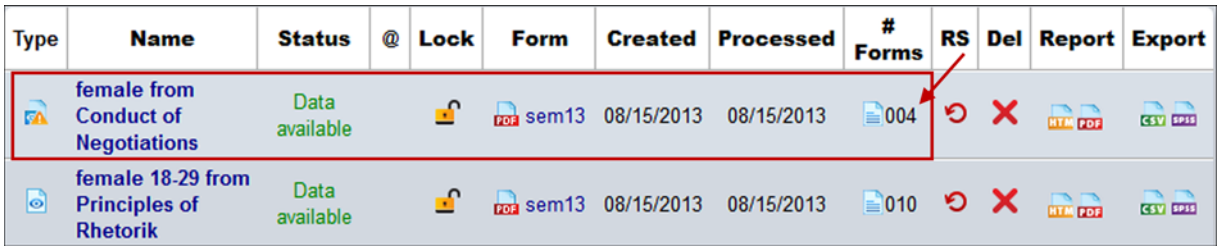

Figure 94: Recalculated, Dynamic Subgroup

If a survey, for which dynamic subgroups exist, is to be deleted, a message will appear, asking what to do with the subgroups. The choices available are either to delete these evaluations or alternatively to keep them by removing their dynamic nature:

Delete Survey
Survey to delete: Conduct of Negotiations
Warning: Deleting a survey causes deleting of all correlative data.
Note: One ore more dynamic subgroup reports exist for this report.
Also delete dynamic subgroup reports
Keep dynamic subgroup reports
OK
Cancel

Figure 95: Deleting a Survey, for Which Dynamic Subgroups Exist

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7.3. Exporting data to CSV/SPHINX/SPSS

So as to further evaluate your data, these can be exported to CSV, SPHINX (if licensed) and SPSS at any time.

They are to be found in the survey list as well as below the survey details (by clicking on the survey name, you reach the survey details).

Note:
First open the PDF report. Otherwise the raw data may not be shown or may not be current.

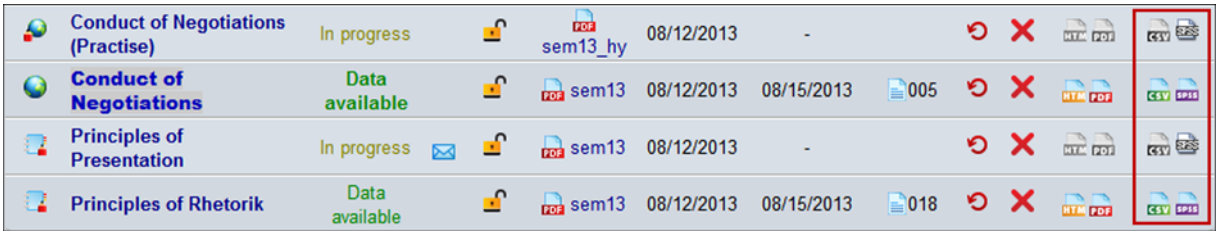

Figure 96: Export Options (Folder View)

Raw data can be exported in three different formats.

Figure 97: Export Options (Details of a Survey)

The button [Codebook] shows you, which content of the questionnaire corresponds to which value in the raw data. This helps you to correctly interpret the raw data.

7.3.1. Raw Data in SPSS Format

Should you wish to continue using the survey data in SPSS, the SPSS export function is at your disposal. Click on the text and, in the dialogue that opens, save the file to your hard drive. This will create a SAV file, which can now be opened using SPSS.

7.3.2. Raw Data in CSV Format

Should you wish to continue using the survey data in another application, such as Microsoft Excel, the CSV export function is at your disposal. A mouse click opens a dialogue box that notifies you that you can open the file directly or save it.

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7.3.3. Raw Data in Sphinx Format

The statistic solution Sphinx Plus² is available as an extension to EvaSys. With this export interface activated, all surveys, compilations, filtering or archives can be created in the Sphinx format. Simply click on the text and you will see a download window. Save the transferred zip file in a folder on the local hard disk.

The data is transmitted as a ZIP file, as three individual files must be transmitted. Extract the ZIP file. You will receive a subfolder, in which there are three files.

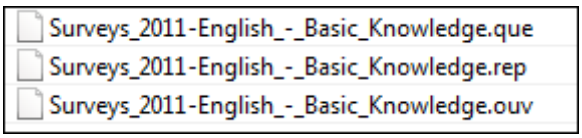

Figure 98: Files for Retrieving Data in Sphinx

Open the QUE file with a double mouse click. Sphinx Plus² will then automatically launch and open the survey. As, in addition to the raw data, the complete content of the questionnaire is transmitted, you can immediately start a complete analysis of the results in Sphinx.

8. Question Library

For your work with the VividForms Editor you can use a question library, i.e. a pool of predefined questions, which can be complemented by your own questions.

The question library can be found in the menu “Actions/Questionnaire”.

Different editing functions as well as functions for import and export are available here. Also, a print preview of all question groups and questions can be accessed.

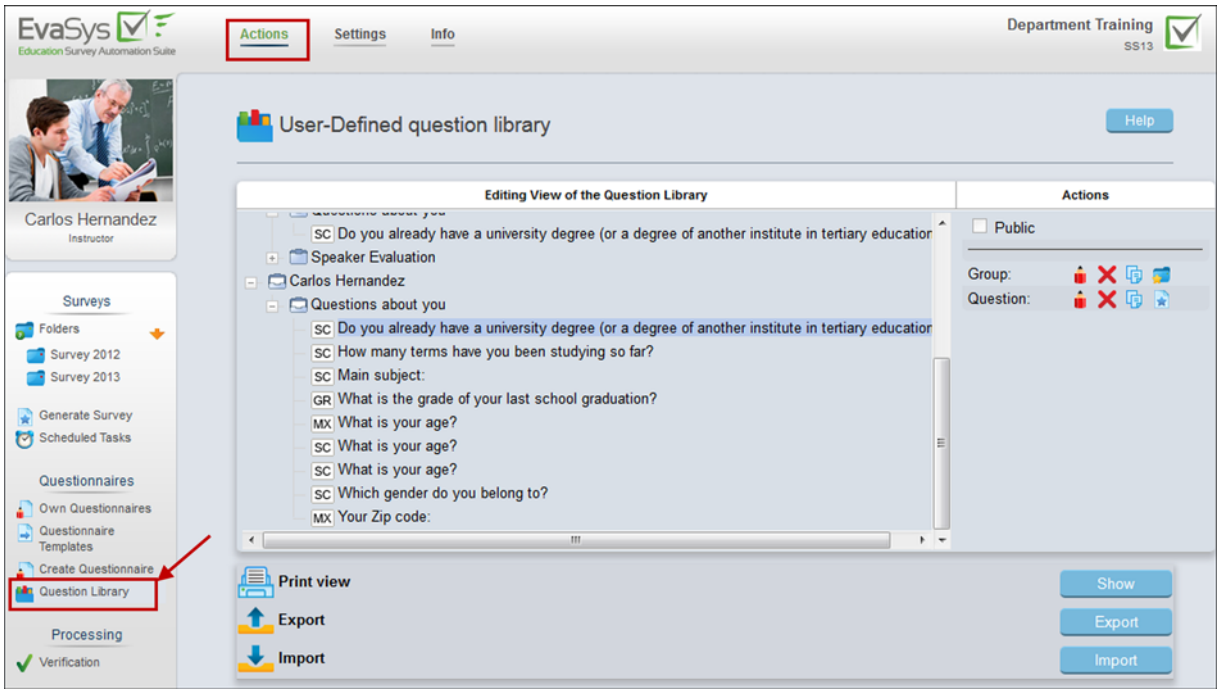

Figure 99: Question Library

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Editing View

In the editing view, the current content of the question library is displayed in the form of a tree structure consisting of three levels:

- User, which means the “Owner” of the question groups/questions (Administrator, Subunit Administrator or Active User)
- Question Groups
- Questions

By clicking on a user/a question group or on the open/close symbol in front of the entry, the entry is opened and the elements contained therein are displayed. By clicking on a question group or question, the corresponding properties and available actions are displayed in the right hand window.

In the upper area it is defined whether the question group or question is a public or non-public one. Public questions and question groups are available to all users (subunit administrators, active instructors), non-public only to the relevant owner of the question/group. By activating or deactivating this option, the public status can be changed at any time.

For each question group and question, four actions can be undertaken:

- Edit: enables the retrospective editing of a question/group
- Delete: deletes the question/group from the library
- Copy: copies a question/group
- New Group/Question: creates a new group or question in the library

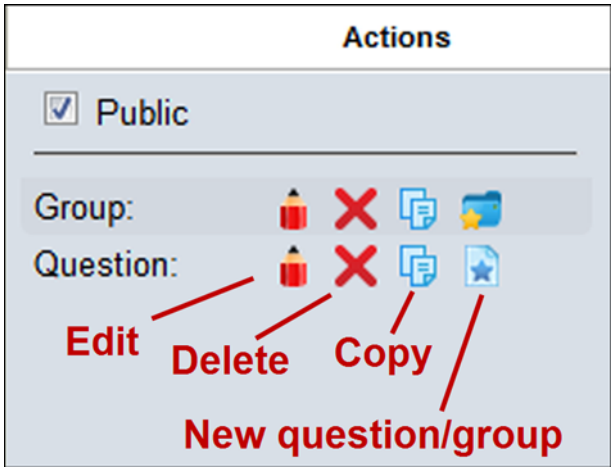

Figure 100: Question Library - Actions

To edit a question, use the mouse in the editing view to mark the desired question and then click on the green pencil in the area “Question”. The Question Wizard known from work with the VividForms Editor opens.

Here, the desired changes (e.g. changes to the question text, the answer options or the pole texts etc.) can be made.

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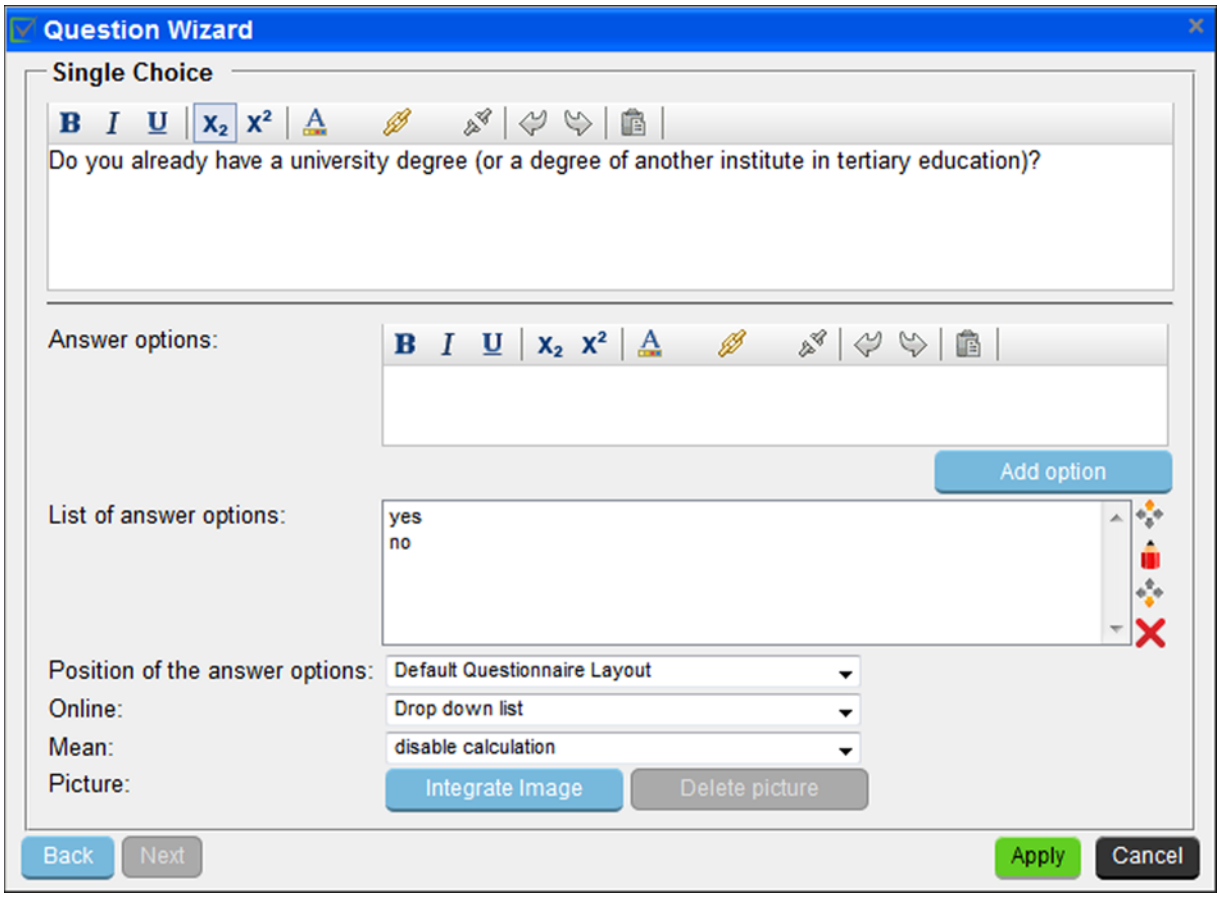

Figure 101: Question Library - Editing Questions

To edit a question group, use the mouse to mark the group or any question within the group and click on the green pencil in the area “Group”. Here too, the Question Wizard opens and enables editing.

To delete or copy a group or a question, mark the desired element and select the relevant action. Please observe, when deleting a question group, all questions contained therein are also deleted.

If you want to create a new question or question group, click on the corresponding icon in the category Group or Question. The wizard opens with which you can undertake the required settings. Finally, click on [Apply]. The group or question is now displayed in the library. Please observe that the new question is always created in the library group which is currently marked.

Import and Export

The import into the question library as well as the export from it, is achieved via a CSV file. An example file for the import is included in the system (“System Information/ Sample files/Question library”).

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When importing the question library as a CSV file, the following structure must be adhered to:

Column 1	Column 2*	Column 3*	Column 4	Column 5*	Column 6*	Column 7*	Column 8*	Column 9*	Column 10*	Column 11*
Question Group Title	Question type	Number of options	Question text	Left pole	Right pole	Absten-tion	Points for Exam Questions	Exam Question	Degree of Difficulty	Maximum Number of Characters for Open Questions (Online)

Table 1: Structure of the question library (CSV file)

Column 2*- The **Question types** are assigned numbers, the following schema is valid:

0 – Scaled Question

2 – Open Question

4 – Grade Value Question

6 – Single Choice Question with up to 11 answer options (answer options located next to the question text, all answer options are displayed in the report)

8 – Multiple Choice Question

10 – Single Choice Question with any number of answer options (answer options located beneath the question text, only selected answer options are displayed in the report)

14 – Matrix Field Question

Note:
For scaled questions neither mirroring nor dual scale functions can be imported or exported.

Column 3* - **Number of options:** In scaled questions, the number of checkboxes is stored here. In grade value questions and open questions this field remains empty. In single choice, single choice extended and multiple choice questions, the number of response options is recorded. In matrix field questions the number of groups in the PDF report is recorded here.

Column 5* - **Left pole:** In scaled questions the left pole description is recorded here. In open questions you can enter the number of lines available to the survey participant for his response here. In grade value questions this field remains empty. In single choice, single choice extended and multiple choice questions, the response

options are recorded here. Please note, the different response options must be separated by a vertical line (Pipe) “|”. In matrix field questions enter the minimum value here.

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Column 6* - **Right pole:** In scaled questions the right pole description is recorded here. In matrix field questions enter the maximum value here. For all other question types, this field remains empty

Column 7* - **Abstention:** In scaled questions an abstention text can be stored here.

For all other question types, this field remains empty

Column 8* - **Points for Exam Questions:** This column remains empty for evaluation questions. Enter here the points for each answer option for exam questions (EvaExam). Please ensure that the sequence of points is in agreement with the sequence of answer options. The different points must also be separated by a vertical line (pipe) "|".

Column 9* - **Exam Question:** The entry "0" marks the question as a question for evaluation questionnaires. The entry "1" stands for an exam question, meaning there is a question for the exam tool EvaExam.

Column 10* - **Degree of Difficulty:** This column remains empty for evaluation questions. The degree of difficulty of a question is entered here for exam questions. Values between "1" and "5" are possible. The value "0" means that no degree of difficulty has been assigned.

Column 11* - **Maximum Number of Characters for Open Questions (Online):** To answer open questions in online surveys, a maximum permitted number of characters can be specified here. This means a participant cannot type in more characters than predefined. When the value is "0", the participant can type in as many characters as desired. This column remains empty for all other questions.

The following example should clarify the structure of a CSV file for you:

Personal Details	4		Grade of Your last graduation					0		
Personal Details	14	5	Age:	18	99			0		
Personal Details	6	2	Gender:	Male| Female				0		
Course: Planning and Presentation	0	4	The course provides a good overview of the topic.	Agree	Disagree	n/a		0		
Course: Planning and Presentation	2		Your comment on the course content:	3				0		2000
General education	8	6	Name the three principal components of air.	oxygen| nitrogen| argon| helium| carbon dioxide| hydrogen			1|0|1|0|0	1	1	
General education	2		Describe the structure of water molecules.		8			1	3	800

Table 2: An example of the CSV file structure when importing and exporting the question library

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This structure is also valid for the export of the question library as a CSV file. To import a question library, click on [Browse] and select an EvaSys question library file. To start the import process, click on [Import].

To export click on [Export]. A “Save as...” dialog appears. Select a folder and click on [Save].

To integrate question groups and questions from the library into your questionnaire, please open the question library in VividForms Editor (See also the separate manual “Creating Questionnaires with VividForms”).

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C. Settings and Information

The main menu "Settings" contains the navigation sections "Account", "Tools" and "Quality Management". In the navigation section "Account" you can adapt your user profile (chapter 2 2. "Adjusting Your Individual Profile").

1. Tools

Apart from the "Automated Tasks", which are explained hereafter, you have the option to write an email to a user in your subunit by using the "Write Email" function. The email is sent to the email address defined for the user in his user details. Select a recipient and enter the email text.

1.1. Automated Tasks

Via the menu entry “Settings” you can define process defaults to enable a further automation of your work with EvaSys.

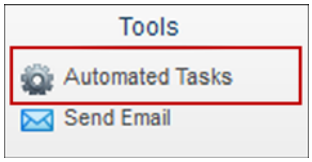

Figure 102: Access to automated Tasks

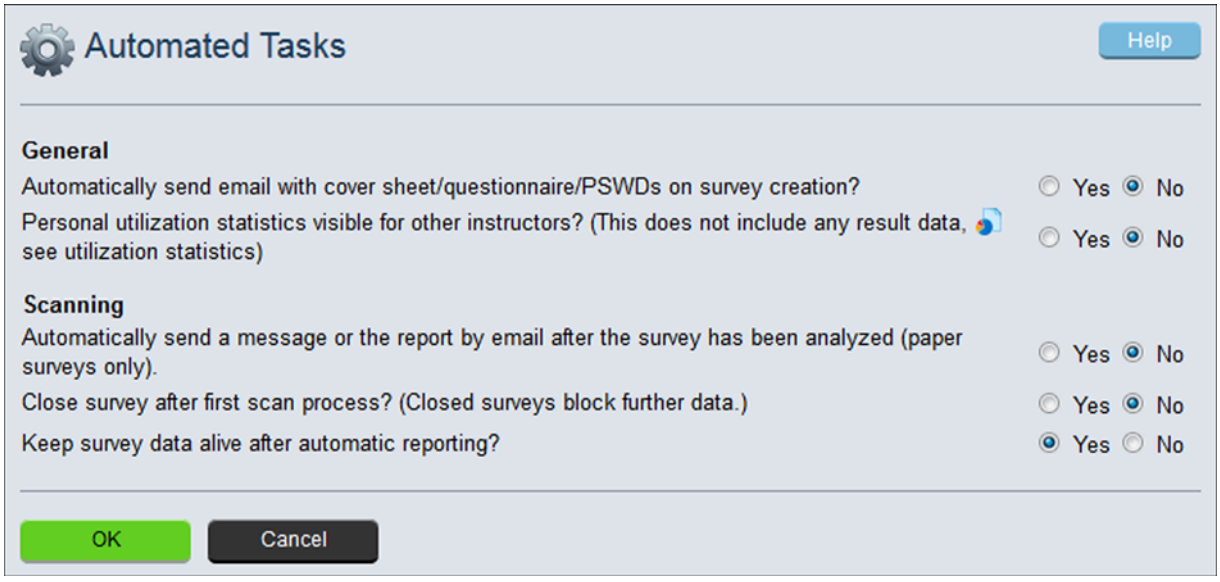
Automated Tasks
Help
General
Automatically send email with cover sheet/questionnaire/PSWDs on survey creation?
Yes No
Personal utilization statistics visible for other instructors? (This does not include any result data, see utilization statistics)
Yes No
Scanning
Automatically send a message or the report by email after the survey has been analyzed (paper surveys only).
Yes No
Close survey after first scan process? (Closed surveys block further data.)
Yes No
Keep survey data alive after automatic reporting?
Yes No
OK
Cancel

Figure 103: Automated Tasks

The following options are available:

When creating surveys automatically send emails with cover sheet / questionnaire / PSWDs?

This option sends the cover sheet or personalized form for your new survey immediately after creation of the survey to the email addresses given in your profile.

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Make own utilization statistics available for other instructors/trainers?

The information contained in the utilization statistics concerning, for example, the number of scanned questionnaires and number of surveys can be viewed by your colleagues if you permit it. Otherwise only the administrator can view the utilization statistics.

After the scanning operation automatically generate email with message or report (only paper survey)?

You can automatically send emails (also with reports) after the forms have been scanned. The email will be sent to the email address given in your profile. If the email does not have a report file then it is a matter of system configuration. A message text or in addition a PDF report and/or CSV raw data can be sent. This setting is made by the administrator.

Close the survey after the scanning operation?

Surveys can be highlighted as either “ended” or “not yet ended”. This function allows you to collect data in a number of scanning operations in different periods of time (e.g. when returns come in “waves”). If you are sure that you will not need further scanning operations after the first scanning operation then you can answer this question with “yes”.

Keep survey data after analysis in the system (only paper survey)?

The survey data is stored in the EvaSys database after it has been captured. The survey data can be deleted manually at any time. If however you would like to delete the survey data before it enters the database you must deactivate this option. In this case you have to activate the option “Automatically send a message or the report by email after the survey has been analyzed (paper surveys only)”.

2. Quality Management

Active users can have the right to access Quality Management Views (QM Views) either for the whole system, special subunits or only for their own surveys. Access rights are controlled by the administrator or subunit administrator of the system. If a user has been granted access rights, in the left side menu a section "Quality Management" is displayed.

The EvaSys Quality Management is based on quality guidelines which have to be defined for a questionnaire by the administrator or subunit administrator. For further information regarding quality guidelines please contact your EvaSys administrator.

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2.1. QM Views

With a click on the menu item “QM view” the quality overview is opened.

This opens the start page of the QM views, which - similar to a dashboard - offers an overview of the results of the quality management based on the quality guidelines.

The area “Statistics” provides an overview of the total number of reports and the reports of the current and last period, together with the reports that have been added since the last login of the user and shows the average quality index attained by each group. By clicking on the group's name a pie chart appears in the adjacent 'Diagram' area showing as a graphic the distribution of reports according to the quality index that has been reached.

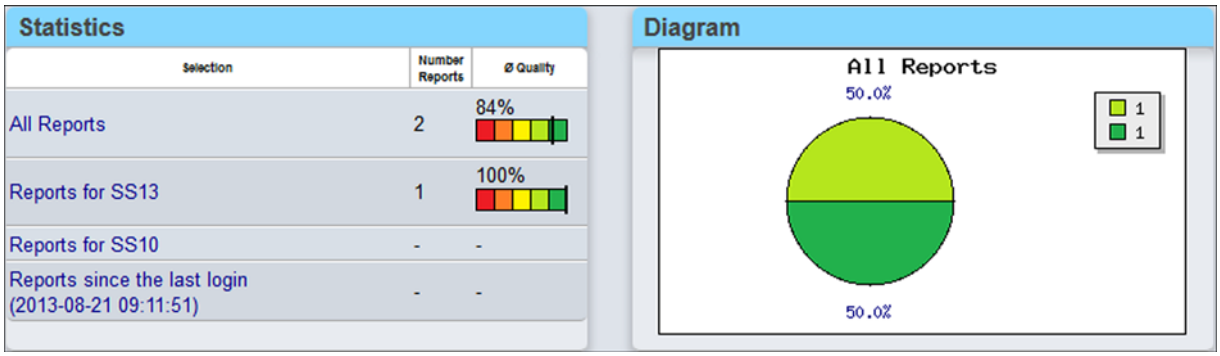

Figure 104: QM Views: Start Page - Area “Statistics” and “Diagram”

In the middle of the page, ten surveys with the highest and lowest quality indexes are presented in a table. The corresponding PDF reports to these surveys can be retrieved by clicking on the PDF icon in the “Report” column.

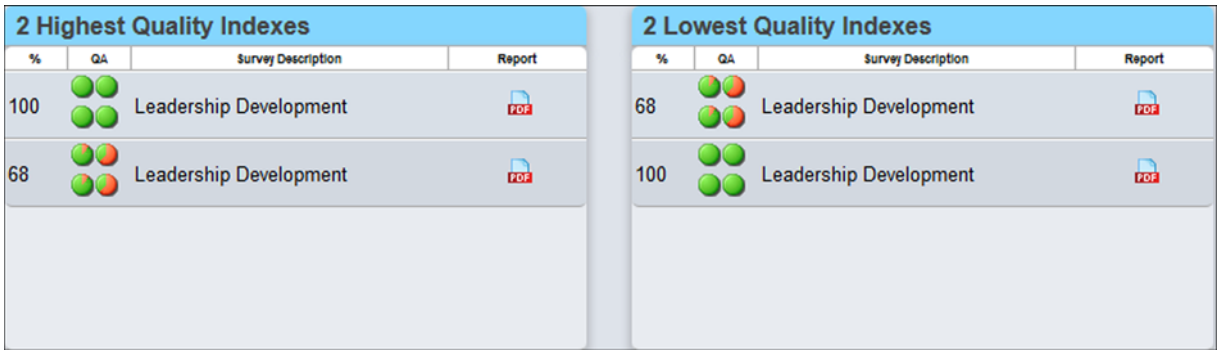

Figure 105: QM Views: Start Page - Highest and Lowest Quality Indexes

At the bottom of the window, the users' previous searches in the QM views are saved and displayed. By clicking on the name of the search the saved view is directly accessed.

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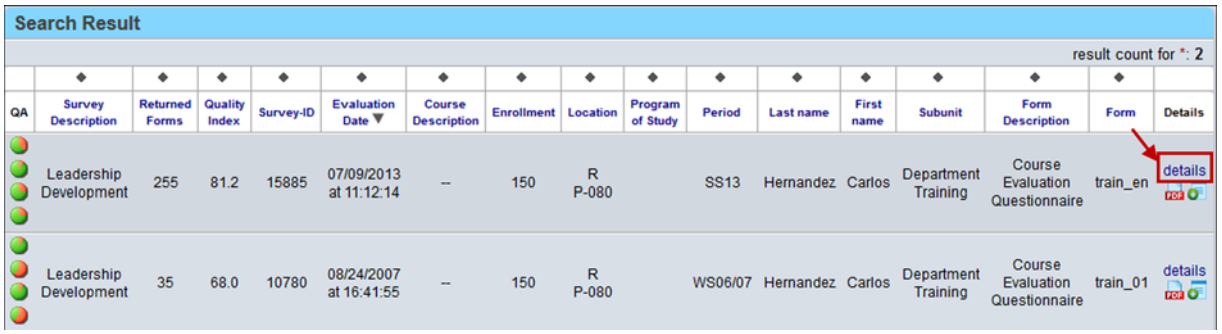
A click on the adjacent button [Continue to table view] leads to a complete overview of all the surveys that have been defined for the quality guidelines.

Figure 106: QM Views: Start Page - Saved Searches and Access to Table

The table opens in a new browser tab or browser window. All evaluated courses with quality guidelines are shown in the list.



QA	Survey Description	Returned Forms	Quality Index	Survey-ID	Evaluation Date	Course Description	Enrollment	Location	Program of Study	Period	Last name	First name	Subunit	Form Description	Form	Details
	Leadership Development	255	81.2	15885	07/09/2013 at 11:12:14	--	150	R P-080		SS13	Hernandez	Carlos	Department Training	Course Evaluation Questionnaire	train_en	details
	Leadership Development	35	68.0	10780	08/24/2007 at 16:41:55	--	150	R P-080		WS06/07	Hernandez	Carlos	Department Training	Course Evaluation Questionnaire	train_01	details

Figure 107: QM Views: Overview

In the example the results are for instance shown for the survey of the course “Leadership Development” with a quality calculated at 68.0 %.

The green-red circles each represent a quality guideline, in this example teaching structure/practical application/interest/interaction. The more red area, the more questions in this quality guideline are below the targeted value. In order to receive a more precise view, click on [Details].

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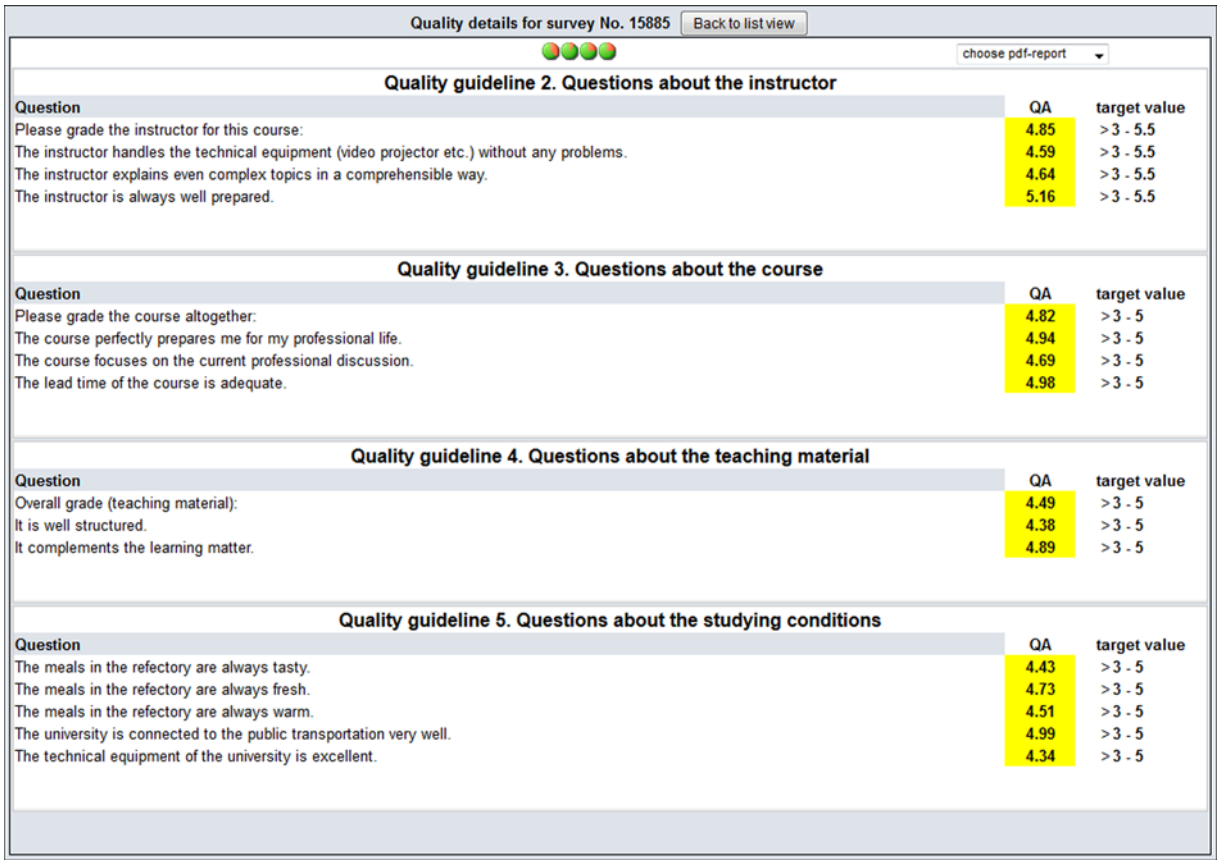
You will then see a detailed list of all the quality guidelines of the questionnaire as well as those questions which did not reach the target value.



Quality details for survey No. 15885 [Back to list view]

choose pdf-report

Quality guideline 2. Questions about the instructor

Question	QA	target value
Please grade the instructor for this course:	4.85	>3 - 5.5
The instructor handles the technical equipment (video projector etc.) without any problems.	4.59	>3 - 5.5
The instructor explains even complex topics in a comprehensible way.	4.64	>3 - 5.5
The instructor is always well prepared.	5.16	>3 - 5.5

Quality guideline 3. Questions about the course

Question	QA	target value
Please grade the course altogether:	4.82	>3 - 5
The course perfectly prepares me for my professional life.	4.94	>3 - 5
The course focuses on the current professional discussion.	4.69	>3 - 5
The lead time of the course is adequate.	4.98	>3 - 5

Quality guideline 4. Questions about the teaching material

Question	QA	target value
Overall grade (teaching material):	4.49	>3 - 5
It is well structured.	4.38	>3 - 5
It complements the learning matter.	4.89	>3 - 5

Quality guideline 5. Questions about the studying conditions

Question	QA	target value
The meals in the refectory are always tasty.	4.43	>3 - 5
The meals in the refectory are always fresh.	4.73	>3 - 5
The meals in the refectory are always warm.	4.51	>3 - 5
The university is connected to the public transportation very well.	4.99	>3 - 5
The technical equipment of the university is excellent.	4.34	>3 - 5

Figure 108: QM Views: Quality Details

If a value is marked in red, the quality guideline has not been met at all; if the color is yellow, the value is within the range of tolerance. Other colors are not applied.

In order to open the complete report of the survey, click on [To the List] and in the line of the survey you are interested in on to open the PDF report.

If an information icon appears in the first column beside the green and red circles, then this means that data is available for this survey that has not yet been incorporated into the quality guidelines calculation. This can be the case, if, for example, the online survey data has been entered, but the PDF report has not yet been opened. Click the icon to calculate the quality guidelines for this survey.

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The quality guidelines are now newly calculated for this survey.

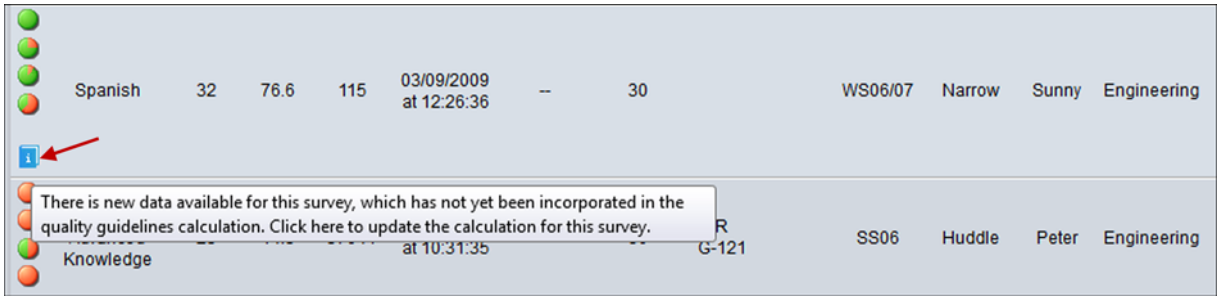
Spanish 32 76.6 115 03/09/2009 at 12:26:36 -- 30 WS06/07 Narrow Sunny Engineering
There is new data available for this survey, which has not yet been incorporated in the quality guidelines calculation. Click here to update the calculation for this survey.
Knowledge
at 10:31:35
G-121
SS06 Huddle Peter Engineering

Figure 109: QM Views: New Calculation for Single Surveys

2.1.1. Definition of Special Search and Table Configurations

In order to build a table according to your own specifications you can define searches yourself and save them. One of these self-defined searches can then be saved as the new default search. When you next login at EvaSys, this self-defined default search will automatically be used.

To define a search use the menu “Options” to arrive at all the necessary functions. These are:

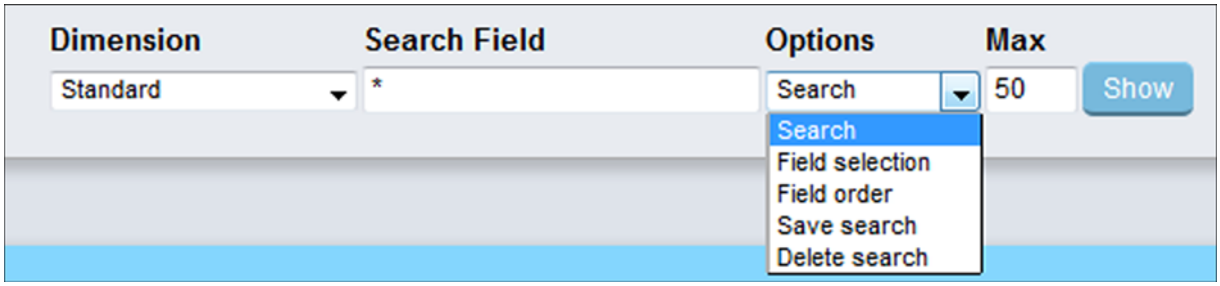

Figure 110: QM Views: Special Search Configuration

- Search:

  This is the search mode in which you will use the table view.
- Field selection:

  Here you can select those database fields you would like to use in your search.
- Field order:

  This allows you to determine or change the sequence of columns selected in “field selection”.
- Save search:

  This function allows you to save the current search settings under a name you enter or to replace an existing search.
- Delete search:

  This function lets you remove self-defined search settings.

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Defining the Display and Search Fields

Using “Field selection” in the option field will display the database fields defined for the current search. In this example the fields are from the pre-set default search. The fields appear twice. In the upper area the fields needed for the table view are marked. In the lower area those fields appear which are to be searched using the “Search” field. The selection of the search fields should include only those fields to be displayed.

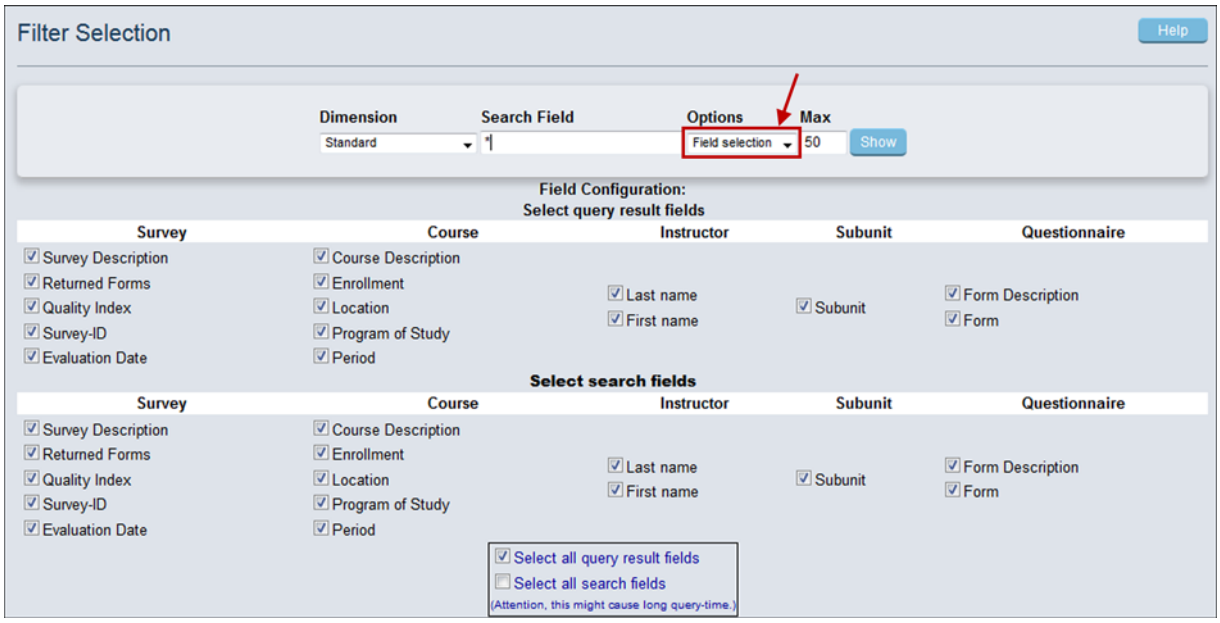

Figure 111: QM Views: Field Selection

Please note that it may not be possible to completely display more than 10 fields in the screen horizontally, i.e. you will then have to scroll. Also a large number of search fields will mean greater use of the database and a noticeably longer processing time.

By clicking on “Select all fields of the search display” or “Select all search fields” at the bottom of this view you can save time if you want to activate all of the above fields.

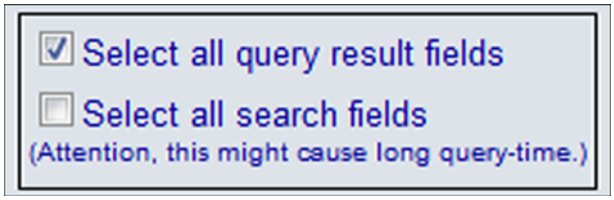

Figure 112: QM Views: Select all Query Result Fields

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Defining the Sequence of the Fields

After you have selected the fields you can change their sequence by using the option “Sequence fields”. Highlight, as shown in the figure, a field name and then click on [<<] “up” or on [>>] “down”.

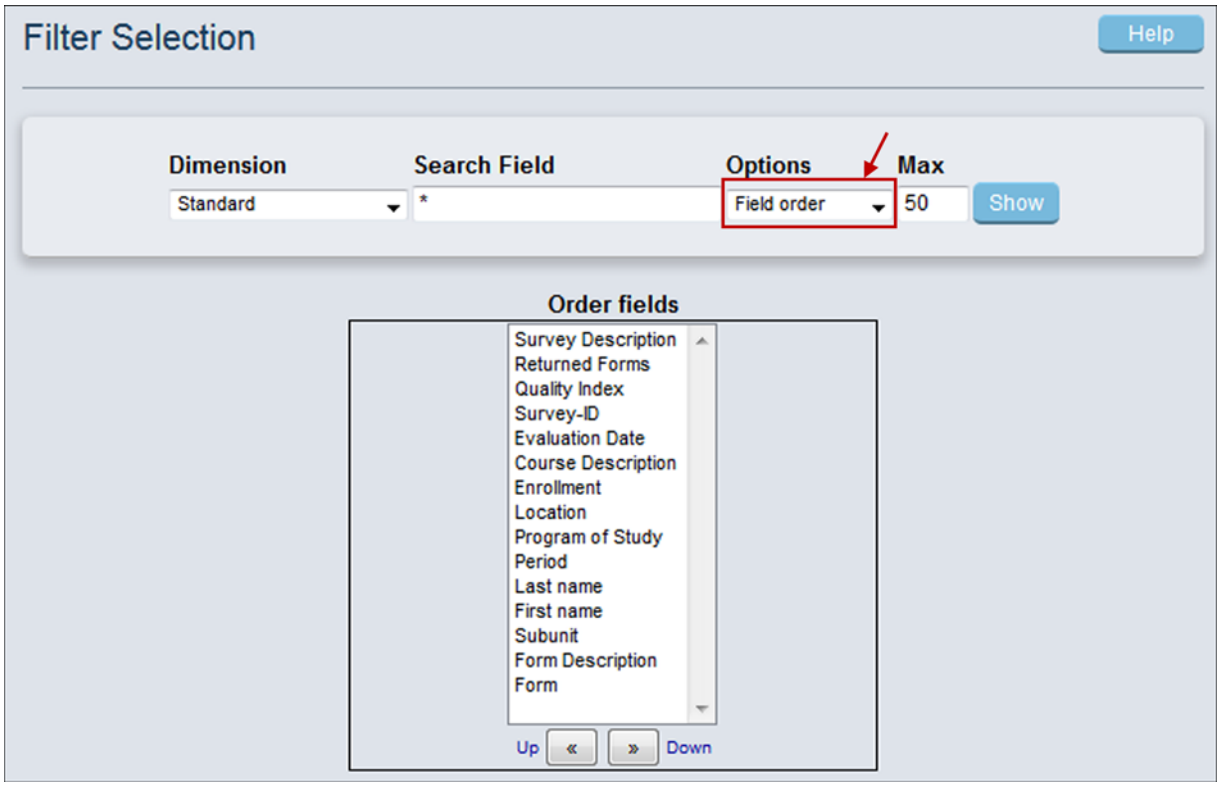

Figure 113: QM Views: Order Fields

Saving Your Search Settings

Now you can save your current search setting. Activate the option “Save search”. Enter a name. By highlighting “Set as default”, the current search setting will be displayed every time you login. Finally click on [Save Search].

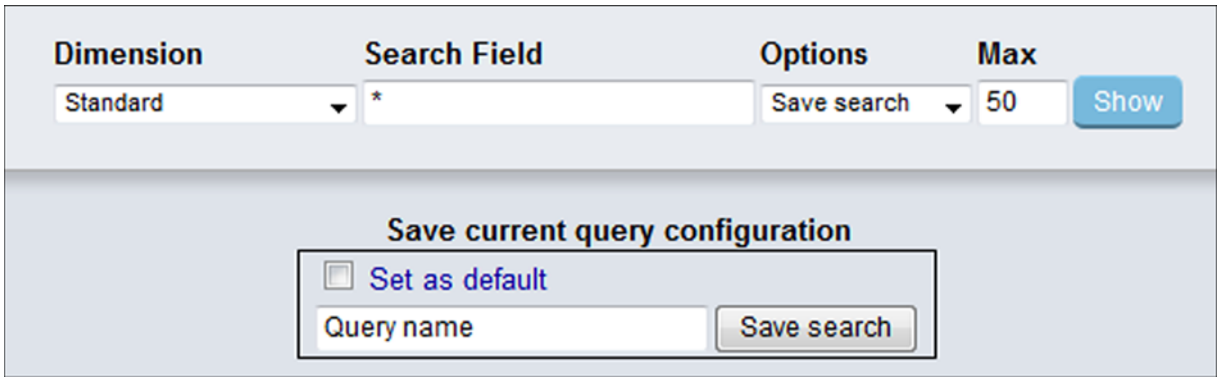

Figure 114: QM Views: Save your Search Settings

Deleting Your Search Settings

Using the option “Delete search” brings you to a selection list in which you can select the search settings to be deleted. Then click on [Delete].

You can only delete settings you have defined yourself.

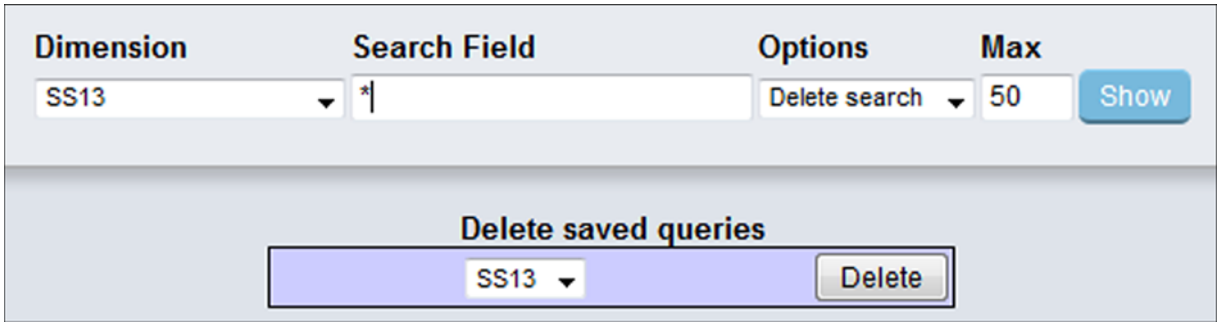

Figure 115: QM Views: Delete your Search Settings

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2.2. Report Dispatch for Quality Management

On the basis of the quality guidelines a report can be sent to selected recipients in regular cycles, which present the results of the EvaSys Quality Management in a matrix. Dispatch cycle, period and recipient can be flexibly defined.

To set up the report dispatch, open the menu “Settings/Quality Management/QM Dispatch Reports”. This opens an input screen where you can store the framework data of the first report dispatch.

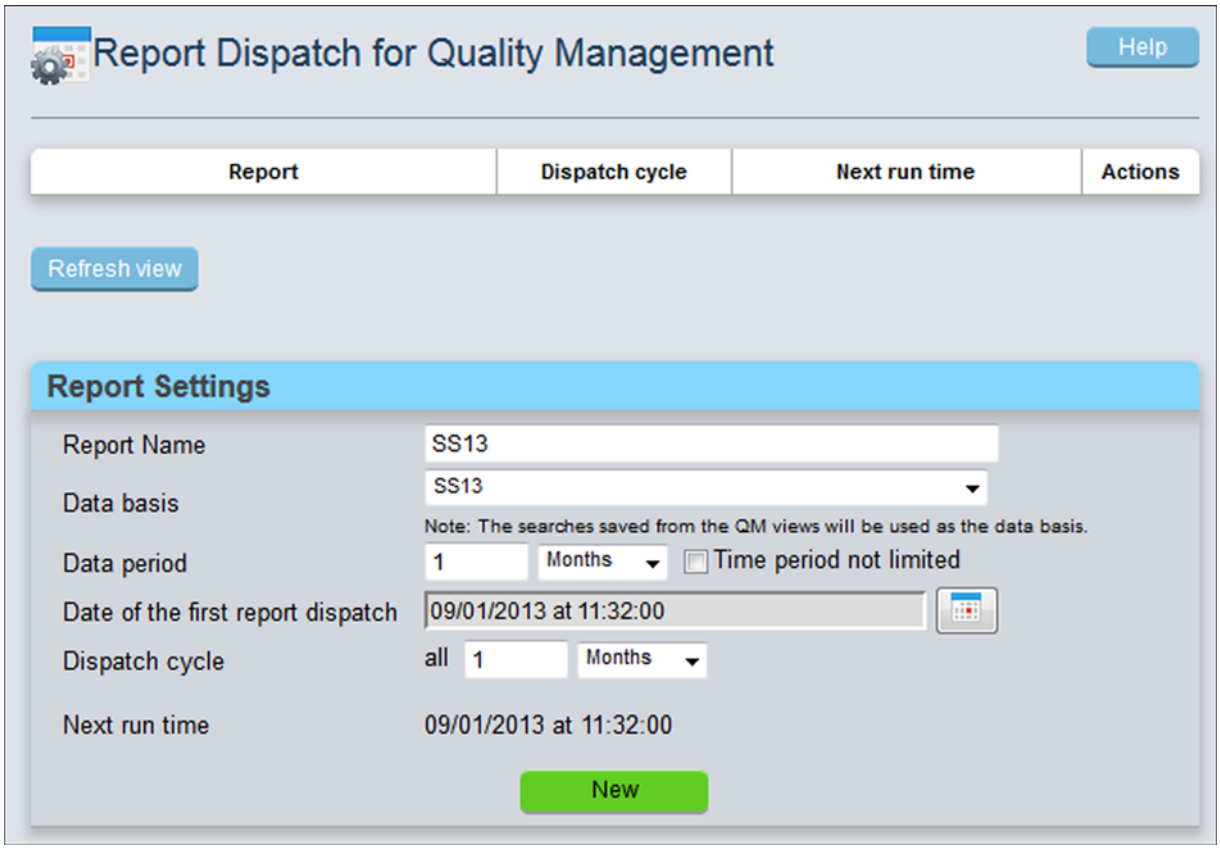

Figure 116: QM Report Dispatch: Settings

First enter the name of the report and then select the data on which the report should be based. Here all defined searches saved in the QM Views are available to you, so that reports can be generated while filtering a limited number of surveys.

Optionally, the data period can be restricted, i.e. a period can be defined from which the presented data should originate. In this way, for example, for weekly reports only the relevant events of the past week are presented in the report. If a period is not specified, all data from the database are used.

Furthermore, the date for the first report dispatch and the dispatch cycle are defined as well as the report recipient being defined from a list of users in the system with the account type professor or dean.

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By clicking on the [New] button, the report settings are saved and the report will be presented in the report list.

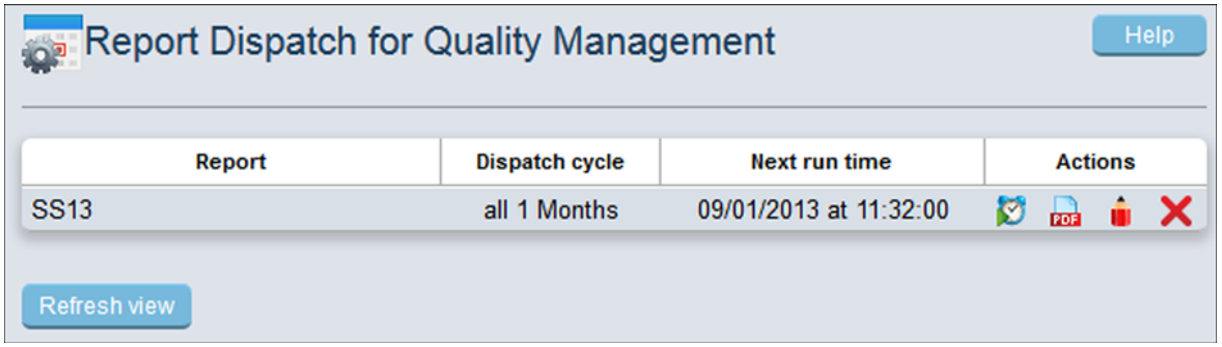
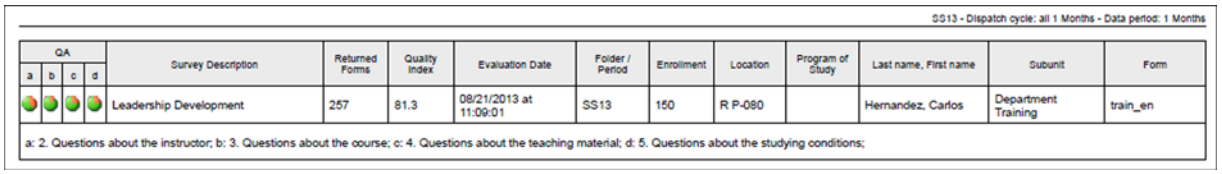


Figure 117: QM Report Dispatch: Report List

In the Actions section the report can, if necessary, be disabled via the clock symbol, by using the pencil symbol it can be edited or deleted by clicking on the cross. Via the PDF symbol, a preview of the report is available on the basis of current database.



SS13 - Dispatch cycle: all 1 Months - Data period: 1 Months

QA				Survey Description	Returned Forms	Quality Index	Evaluation Date	Folder / Period	Enrollment	Location	Program of Study	Last name, First name	Subunit	Form
a	b	c	d											
●	●	●	●	Leadership Development	257	81.3	08/21/2013 at 11:09:01	SS13	150	R P-080		Hernandez, Carlos	Department Training	train_en

a: 2. Questions about the instructor; b: 3. Questions about the course; c: 4. Questions about the teaching material; d: 5. Questions about the studying conditions;

Figure 118: QM Report: Report Preview

3. Main Menu “Info”

The main menu "Info" opens the Info Center. Here the administrator can display information on the usage of EvaSys in your organization.

In the left navigation you will find further information in the sections "Help" and "System Info".

3.1. Help

The Info Center allows the administrator to display information which is relevant for the conduction of surveys in your special organization.

Furthermore you will find here the "Active User Manual", which you have at hand and which explains how to use EvaSys as well as the "Creating Questionnaires Manual" in the current version. Both can be downloaded as PDF files. If you search for specific functions and terms we recommend you to use the CTRL+F keys. A search mask opens allowing you to search in the currently opened PDF file.

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3.2. System Information

In the section “System Infos” you are supplied with information concerning the current status of the system as well as different forms of loggings.

Figure 119: System Information

The following menus are available:

Logbook

The log reflects all processes which can occur when collecting the que

stionnaire data electronically.

Deliveries

Here you can see all the emails that have been sent from your EvaSys user account. Therefore, amongst other things, the emails to the respondents of the online survey will be recorded here.

Utilization Statistics

The command “Utilization Statistics” displays your utilization behavior. Subsequently, you can view the utilization statistics of any colleague as long as their profile allows that kind of access (see configuration).

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